



Montgomery Planning | Functional Planning & Policy Division

2020 Subdivision Staging Policy Update

Planning Board Briefing on the Schools Element
March 5, 2020



Briefing Outline

- I. Overview of the 2020 Schools Update
- II. Communications, Outreach and Engagement
 - Workshops, Community Meetings and Roundtables
 - Schools Technical Advisory Team
- III. School Adequacy Measures in Other Jurisdictions
- IV. Relevant Data
- V. Viewpoints on Key Elements of the SSP
- VI. Next Steps

I. Overview of the 2020 Schools Update

What is the Subdivision Staging Policy?

- The County's Adequate Public Facilities Ordinance (APFO) became law in 1973:
 - *“The [Planning] Board may only approve a preliminary plan when it finds that public facilities will be **adequate** to support and service the subdivision. Public facilities and services to be examined for adequacy include roads and transportation facilities, sewer and water service, schools, police stations, firehouses, and health clinics.”* §50.4.3(J) of the County Code
- The SSP is the set of policy tools that administer the APFO, define infrastructure adequacy, and describe how adequacy is measured.

What Does the SSP Do?

- Requires the Planning Board to annually approve the results of a **school test** evaluating projected school capacity *five years in the future*
- Establishes the criteria for enacting **development moratoria** based on projected school capacity utilization
- Identifies **exceptions to the moratoria**
- Previously, established thresholds for **school facility payments**



Updates to the Subdivision Staging Policy

- Policy is currently updated every four years
- Certain aspects of the policy are updated more frequently:
 - Student generation rates are updated biennially
 - School test results are updated annually
- 2016-2020 Subdivision Staging Policy
 - Adopted by Council Resolution 18-671 on November 15, 2016
 - Council Resolution 18-1087 on April 17, 2018
 - Council Resolution 19-147 on June 25, 2019

2020 Schools Update Effort

- How do we shift the focus of the SSP to be:
 - **less** about stopping development in areas with inadequate school infrastructure, and
 - **more** about providing the school infrastructure required to support the type and amount of growth we need, where it's desired?
- How can the SSP support the county's other policy priorities?
 - Meeting the county's housing goals
 - Affordable housing
 - Economic development
 - Improving equity conditions

2020 Schools Update Effort

- **Data-driven and stakeholder-informed**
- Review of all aspects of the policy:
 - The moratorium, its thresholds and its exceptions
 - The Annual School Test procedures
 - Estimating enrollment impacts
 - Development queue and pipeline impacts
 - Impacts of neighborhood turnover on enrollment
 - Potential reintroduction of school facility payments

II. Communications, Outreach and Engagement

Key Accomplishments


- Created (and frequently updated) SSP Update website
- Held kick-off workshop
- Conducted several SSP outreach/presentations
- Conducted five roundtable discussion events
- Delivered several eLetter updates
- Established the STAT and engaged the group in 6 meetings

2020 SSP Update Website

- Updated frequently
- Contains pages for both the STAT and the TISTWG, with materials and videos from meetings
- Contact forms and open-ended questionnaires

Subdivision Staging Policy

[Planners](#) [Functional](#) [Subdivision Staging Policy](#)




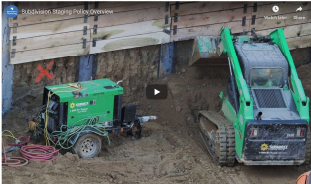
2020 Subdivision Staging Policy Update

The Montgomery County Planning Department is kicking off efforts for the next update to the Subdivision Staging Policy, which is scheduled to be reviewed and approved by the County Council by November 2020. Stay tuned for information about how to get involved in this ongoing process.


Background

The Subdivision Staging Policy is the tool by which the County ensures its essential public facilities, particularly schools and transportation systems, keep pace with development. It tests the County's infrastructure for adequacy based on projected capacity, growth, and future development. The policy is updated every four years to ensure that the tools used for evaluating the impact of development on essential public facilities, such as a delay-based transportation test or student generation rates, reflect the latest growth patterns of the County.


[SIGN UP FOR THE SSP E-LETTER](#)




Jason Sartori




About the SSP




Transportation




Schools




Outreach



Resources



Development



2016 Subdivision Staging Policy

Staff Contact

Jason Sartori
301-495-2172
[Email](#)

Sign Up For Our eLetter

Stay up-to-date with the latest news and information about the Subdivision Staging Policy

[SIGN UP](#)

2016 Subdivision Staging Policy

View the 2016 Subdivision Staging Policy.

[VIEW](#)

Quick Links

[Annual School Test](#)

[Metro Policy Areas](#)

[SSP Glossary](#)

Upcoming Events

Community Plans

[Area 1](#)

[Area 2](#)

[Area 3](#)

[Master Plan List](#)

[Master Planning Process](#)

Popular Pages

[Development Applications](#)

[Planning](#)

[Zoning](#)

[Info Counter](#)

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Kick-off Workshop

- Held October 7 at the Silver Spring Civic Building
- Attended by approximately 65 people (residents and staff)
- Gathered ideas and concerns related to both schools and transportation



SSP Outreach and Presentations

- Montgomery County Chamber of Commerce Land Use Committee (September 10)
- MCCPTA Fall Training (September 14)
- SSP Kick-off Workshop (October 7)
- Capitol View Park HOA Meeting (November 21)
- Bethesda Downtown Plan Implementation Advisory Committee (December 6)
- Montgomery County Civic Federation Meeting (December 9)
- Friends of White Flint (February 4)
- Darnestown Civic Association (March 19)
- Montgomery County Economic Development Corporation (TBD)
- CASA de Maryland (TBD)
- Citizen Advisory Boards (TBD)



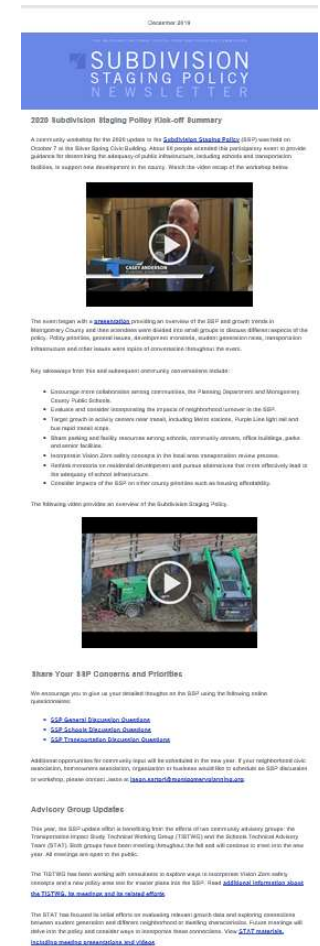
SSP Roundtables

- Developer Roundtable (January 24)
- MCCPTA Roundtable (February 8)
- Upcounty Roundtable (February 20)
- East County Roundtable (February 24)
- Planning Staff Roundtable (March 4)



eLetter Updates

- Updates sent to our Constant Contact SSP group on:
 - August 30
 - December 2
 - January 17
 - February 3



Schools Technical Advisory Team

- The Schools Technical Advisory Team (STAT) has provided analytical guidance to staff and served as a venue for soliciting and vetting policy considerations.
- The STAT consists of a diverse set of stakeholder perspectives and includes representatives from the following:
 - CASA
 - City of Gaithersburg
 - City of Rockville
 - City of Takoma Park
 - Coalition for Smarter Growth
 - Housing Opportunities Commission
 - Montgomery County Chapter of MBIA
 - Montgomery County Civic Federation
 - Montgomery County Council of PTAs
 - Montgomery County EDC
 - Montgomery County Public Schools
 - NAIOP DC|MD
- The STAT also included 12 additional community members
- 11 Commission staff members also participated in the STAT meetings

Schools Technical Advisory Team

October 22

- SSP and Impact Tax Overview
- Similar Jurisdictions
- Montgomery County Growth Trends

November 12

- Alternative Student Generation Rates, Part 1

December 3

- Alternative Student Generation Rates, Part 2
- Initial Policy Discussion

January 16

- Moratorium Policy

January 28

- Funding Mechanisms

February 18

- Annual School Test
- Development Queue

III. School Adequacy Measures in Other Jurisdictions

Jurisdictions Reviewed

Prince George's County, MD	Baltimore County, MD	Howard County, MD	Harford County, MD	Loudoun County, VA	Fairfax County, VA	Arlington, VA
Fresno County, CA	Wake County, NC	Pinellas County, FL	Snohomish County, WA	Contra Costa County, CA	Pierce County, WA	Montgomery County, PA

Topics Reviewed

- APFO or concurrency thresholds
- Growth management policies
- Moratoria
- Impact fees/taxes
- School construction costs
- School adequacy testing
- Strategies to alleviate school crowding

General Takeaways

- Many jurisdictions and school districts around the country are dealing with similar issues of overcrowding in schools and are frequently evaluating their growth management policies.
- Moratoria on development, while more commonly used for transportation issues, are generally not considered in most jurisdictions outside Maryland as a solution to manage crowding in schools.
- Impact fees are a highly debated option to fund public facilities such as schools and roads.
 - Montgomery County and Howard County charge the highest impact taxes in Maryland.
 - Incentivizing desired development patterns by decreasing/increasing impact fees is becoming more popular.
- Housing turnover is generally not addressed in adequate public facilities policies.

IV. Relevant Data

How Many Kids Live There?!

A Student Generation Rate (SGR) is an average of the number of students per dwelling unit.

2018 MCPS Student Generation Rates by Region and Housing Type

COUNTYWIDE STUDENT GENERATION RATES		ES	MS	HS	K-12
Countywide	Single Family Detached	0.199	0.110	0.154	0.462
	Single Family Attached	0.227	0.113	0.150	0.490
	Multi-Family Low to Med Rise	0.197	0.086	0.109	0.393
	Multi-Family High Rise	0.055	0.023	0.031	0.110
	All Dwelling Units	0.185	0.095	0.128	0.408

REGIONAL STUDENT GENERATION RATES		ES	MS	HS	K-12
East Blair, Einstein, Kennedy, Northwood, Wheaton, Blake, Paint Branch and Springbrook clusters	Single Family Detached	0.203	0.103	0.144	0.450
	Single Family Attached	0.219	0.115	0.160	0.494
	Multi-Family Low to Med Rise	0.253	0.112	0.148	0.512
	Multi-Family High Rise	0.088	0.036	0.047	0.171
Southwest Bethesda-Chevy Chase, Churchill, Walter Johnson, Richard Montgomery, Rockville, Whitman, and Wootton clusters	Single Family Detached	0.186	0.109	0.151	0.446
	Single Family Attached	0.167	0.085	0.111	0.363
	Multi-Family Low to Med Rise	0.150	0.068	0.085	0.303
	Multi-Family High Rise	0.041	0.018	0.025	0.084
Upcounty Clarksburg, Damascus, Gaithersburg, Magruder, Northwest, Poolesville, Quince Orchard, Seneca Valley, Sherwood, and Watkins Mill clusters	Single Family Detached	0.210	0.120	0.169	0.499
	Single Family Attached	0.248	0.121	0.157	0.526
	Multi-Family Low to Med Rise	0.183	0.077	0.093	0.352
	Multi-Family High Rise	0.020	0.008	0.010	0.038

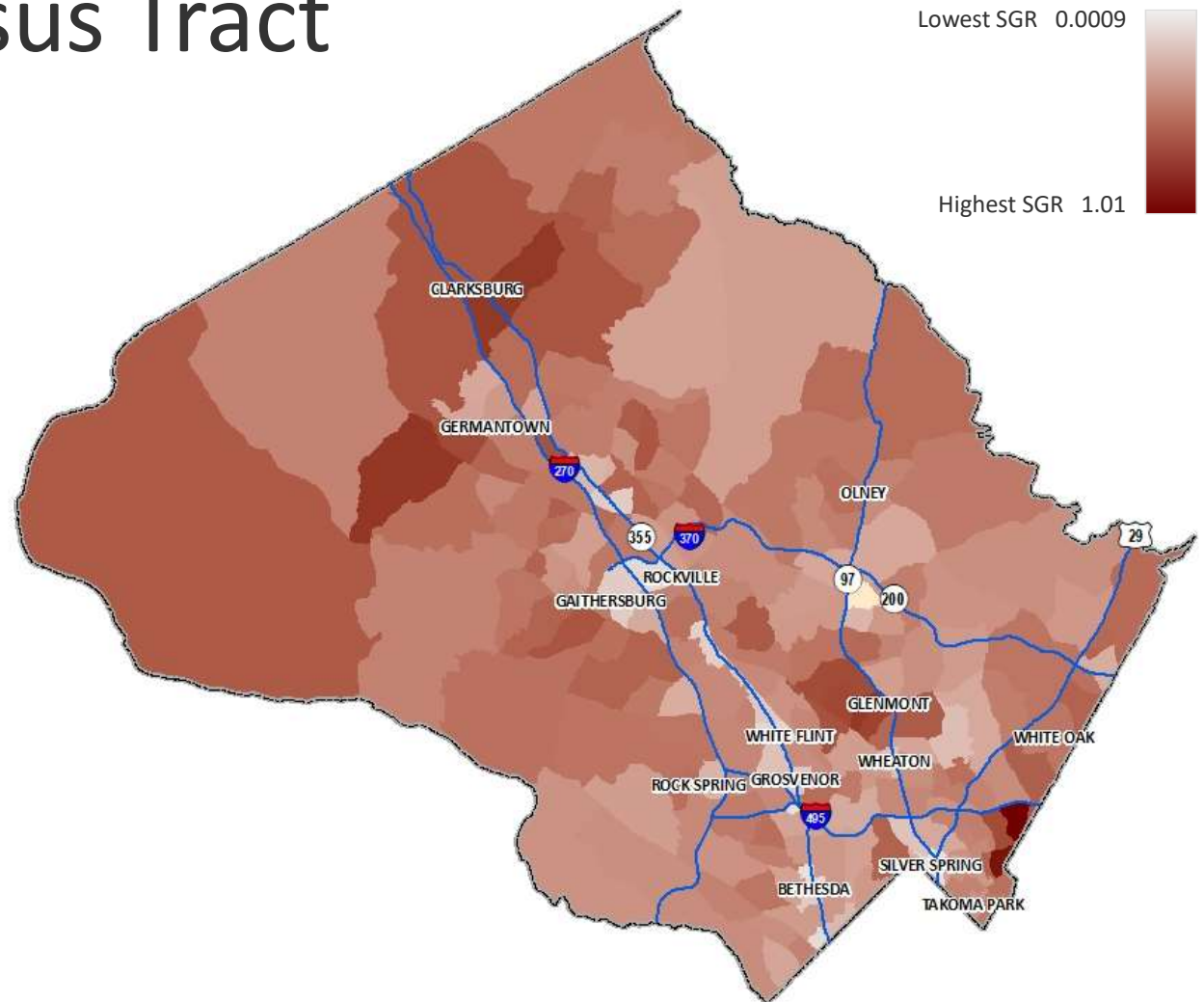
Rates are calculated using Fall 2018 enrollment data from Montgomery County Public Schools. Of the nearly 163,000 students enrolled in MCPS schools in Fall 2018, Planning Staff were able to match 99.4% of the students to a housing type.

Census-Based SGRs

K-12 SGR by Census Tract

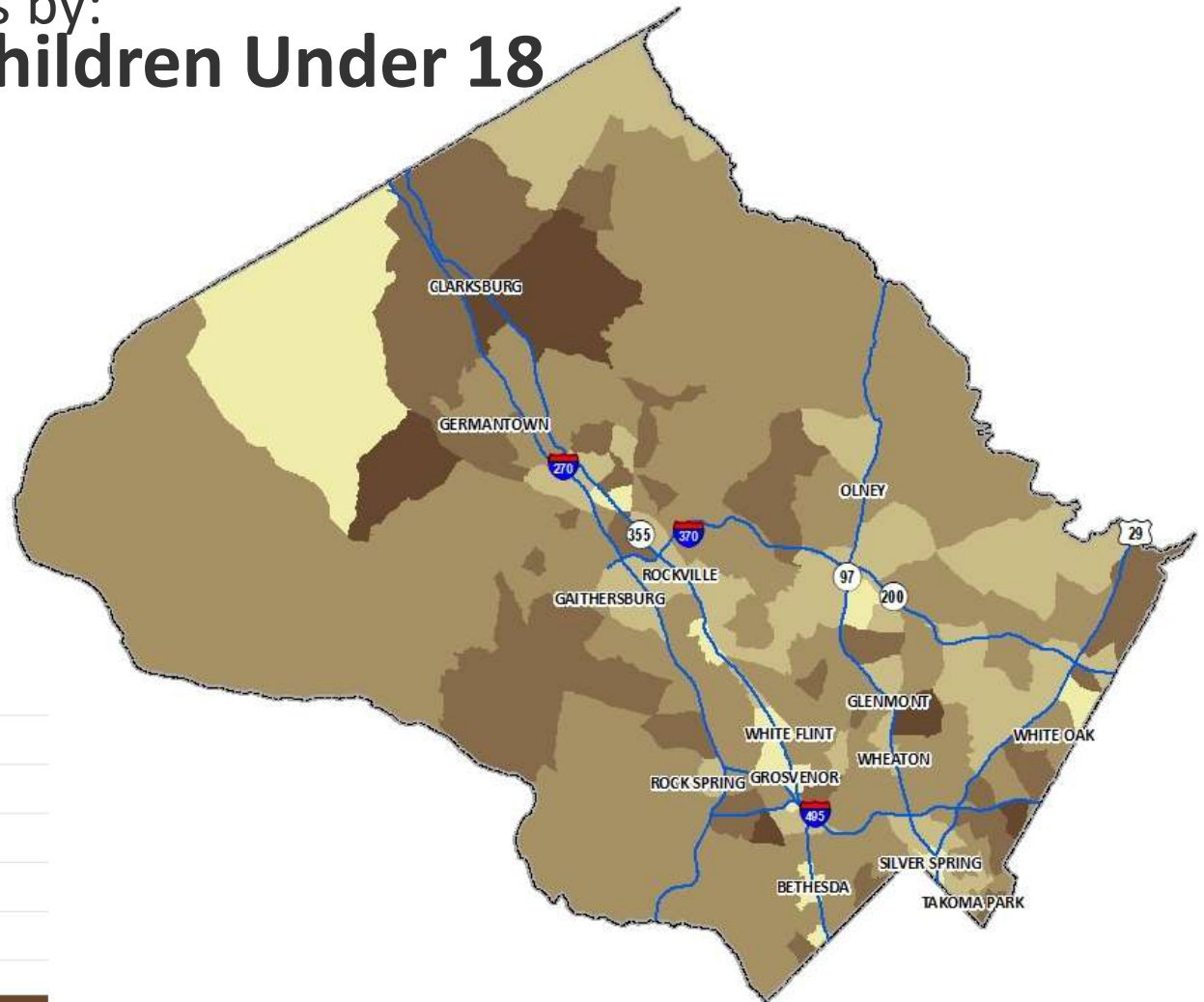
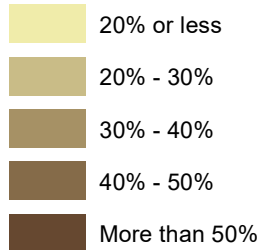
Census Tracts

- small, relatively permanent geographic entities
- boundaries follow visible features
- designed to be homogeneous with respect to population characteristics, economic status, and living conditions
- optimum population size of 4,000 - generally ranges between 1,200 to 8,000+

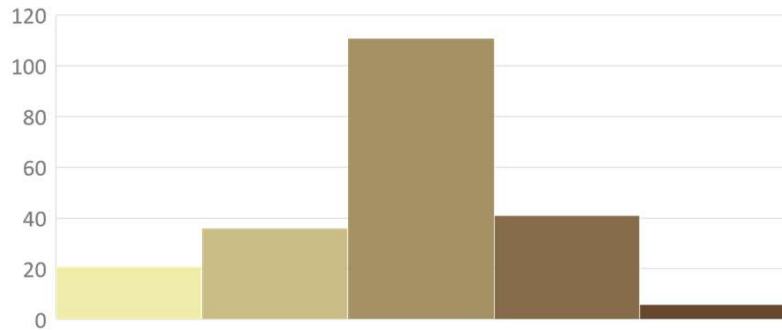


Student Generation Rate by Census Tract, K-12

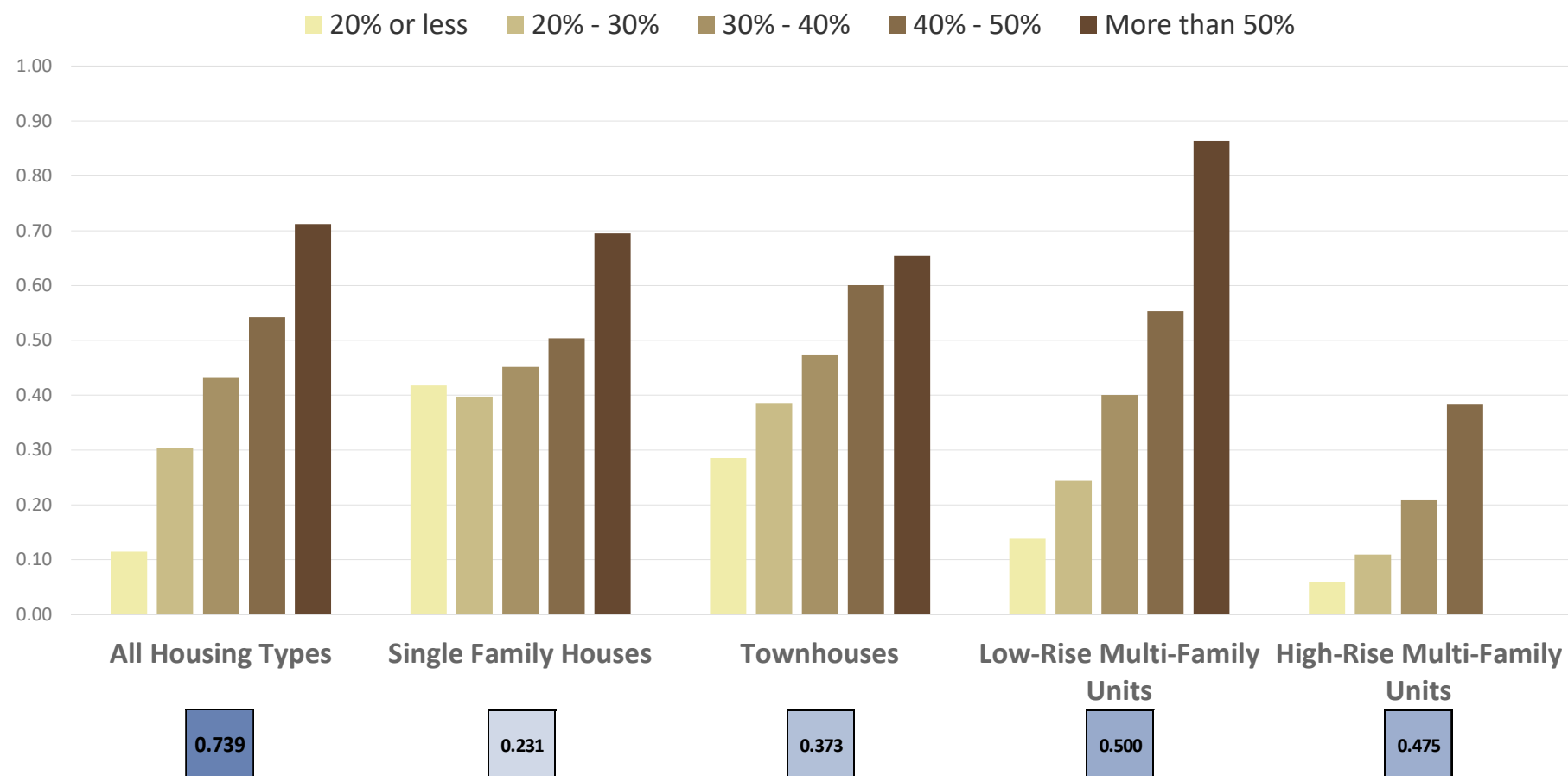
Distribution of Census Tracts by: % of Households w/Children Under 18



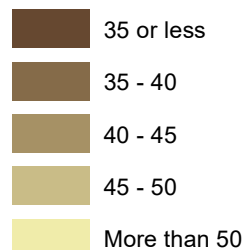
Count of Census Tracts



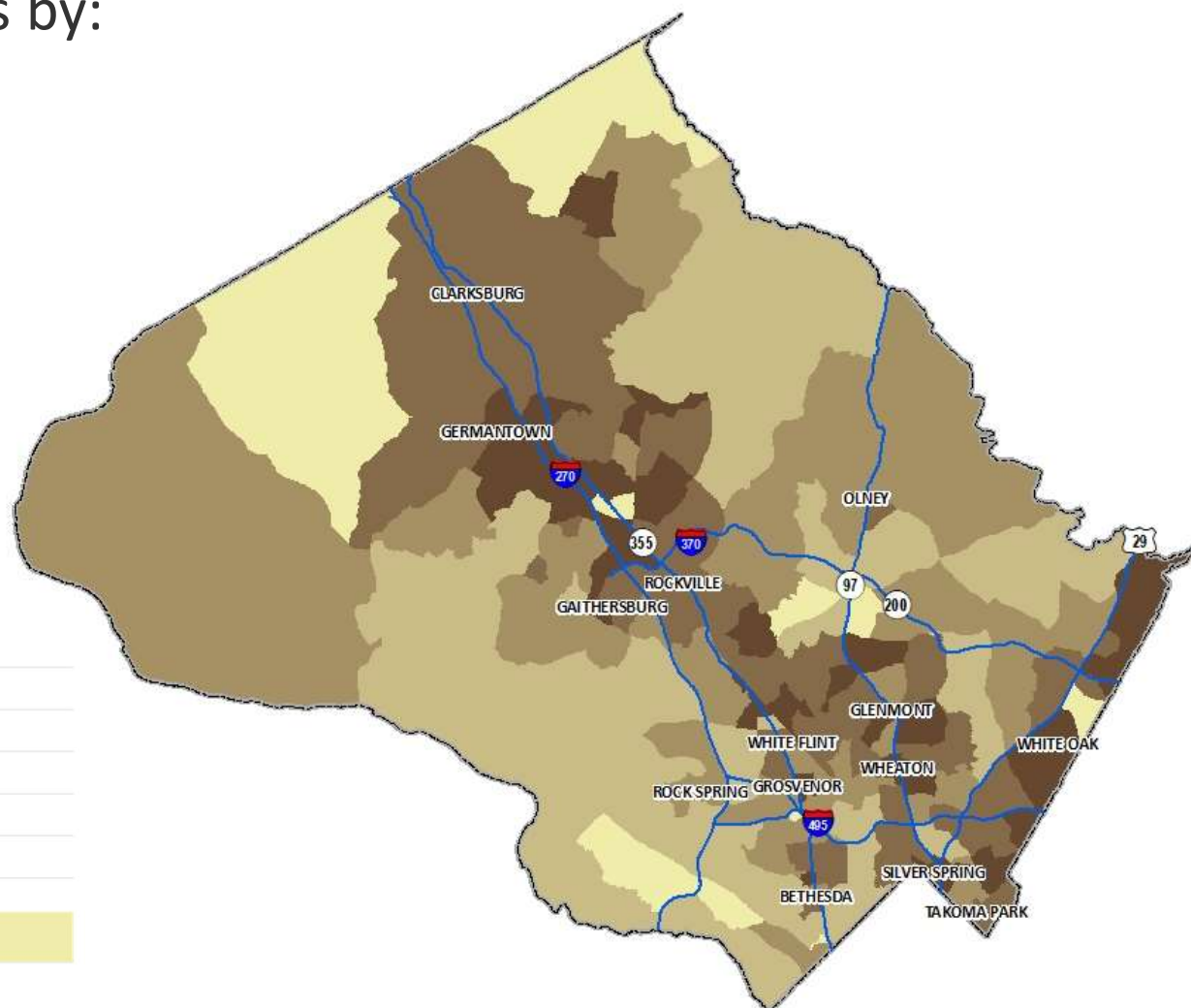
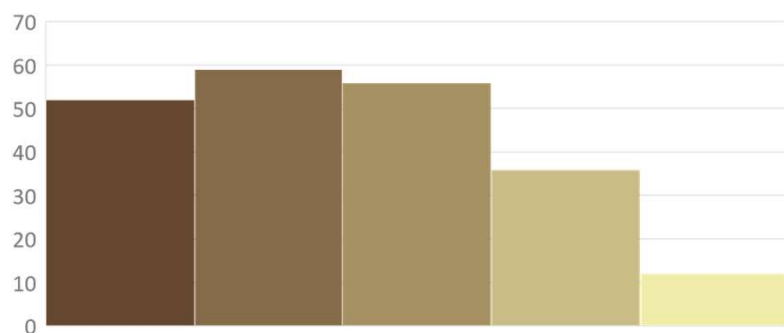
Student Generation Rate for Census Tracts by: % of Households w/Children Under 18 & Housing Type



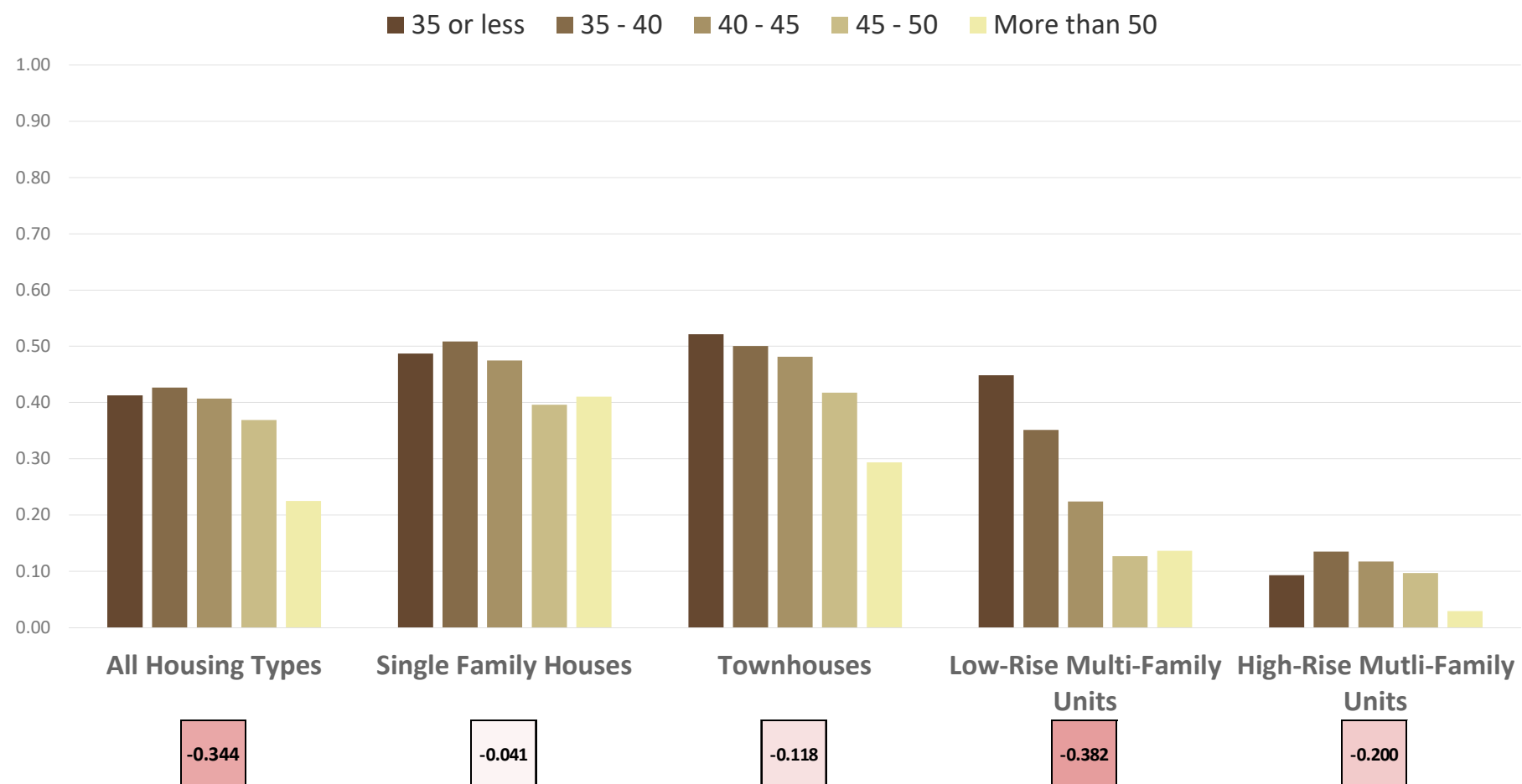
Distribution of Census Tracts by: Median Age



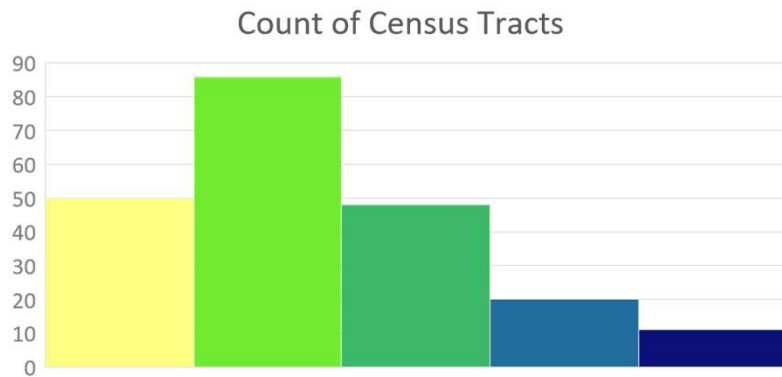
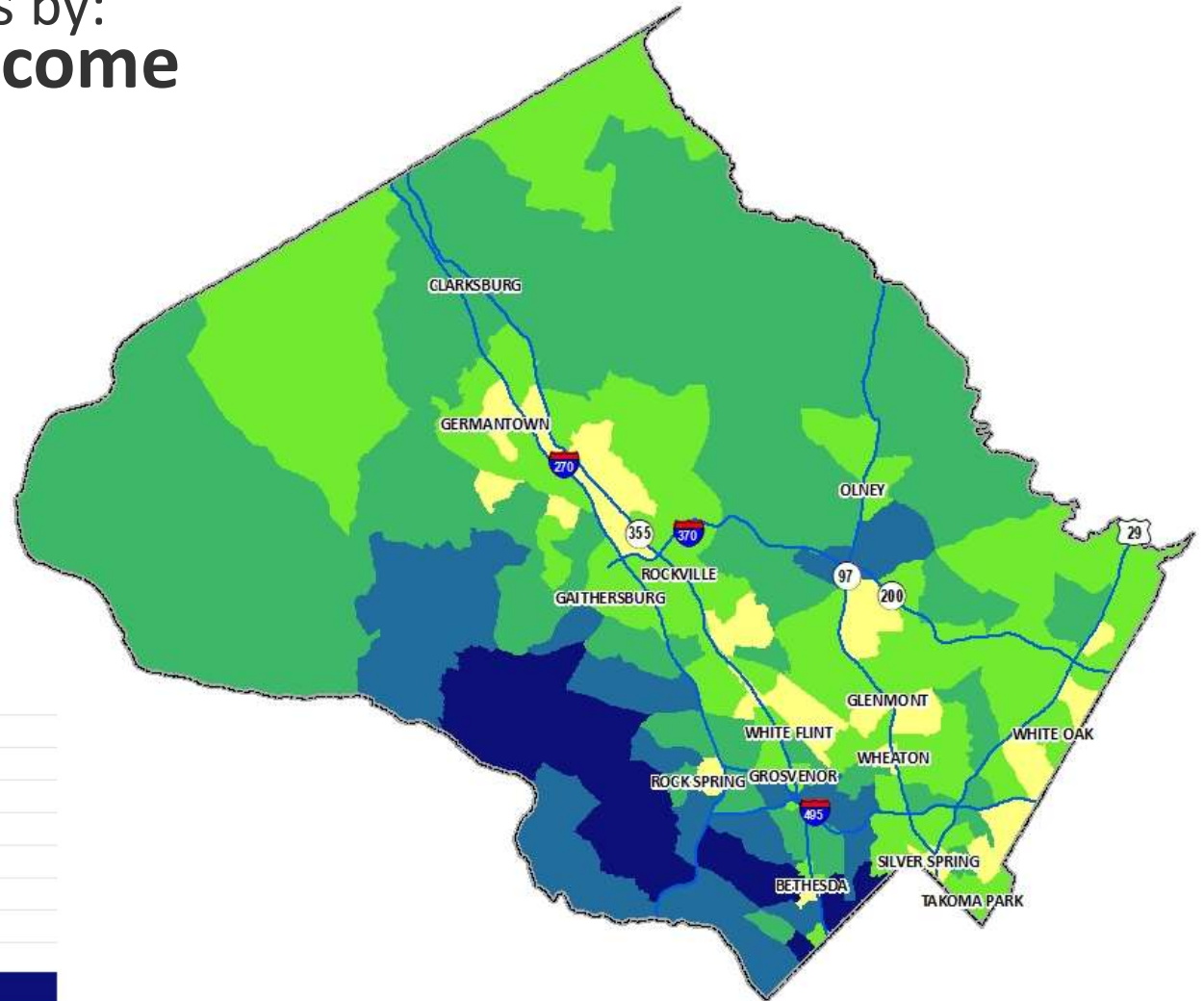
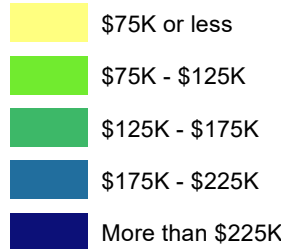
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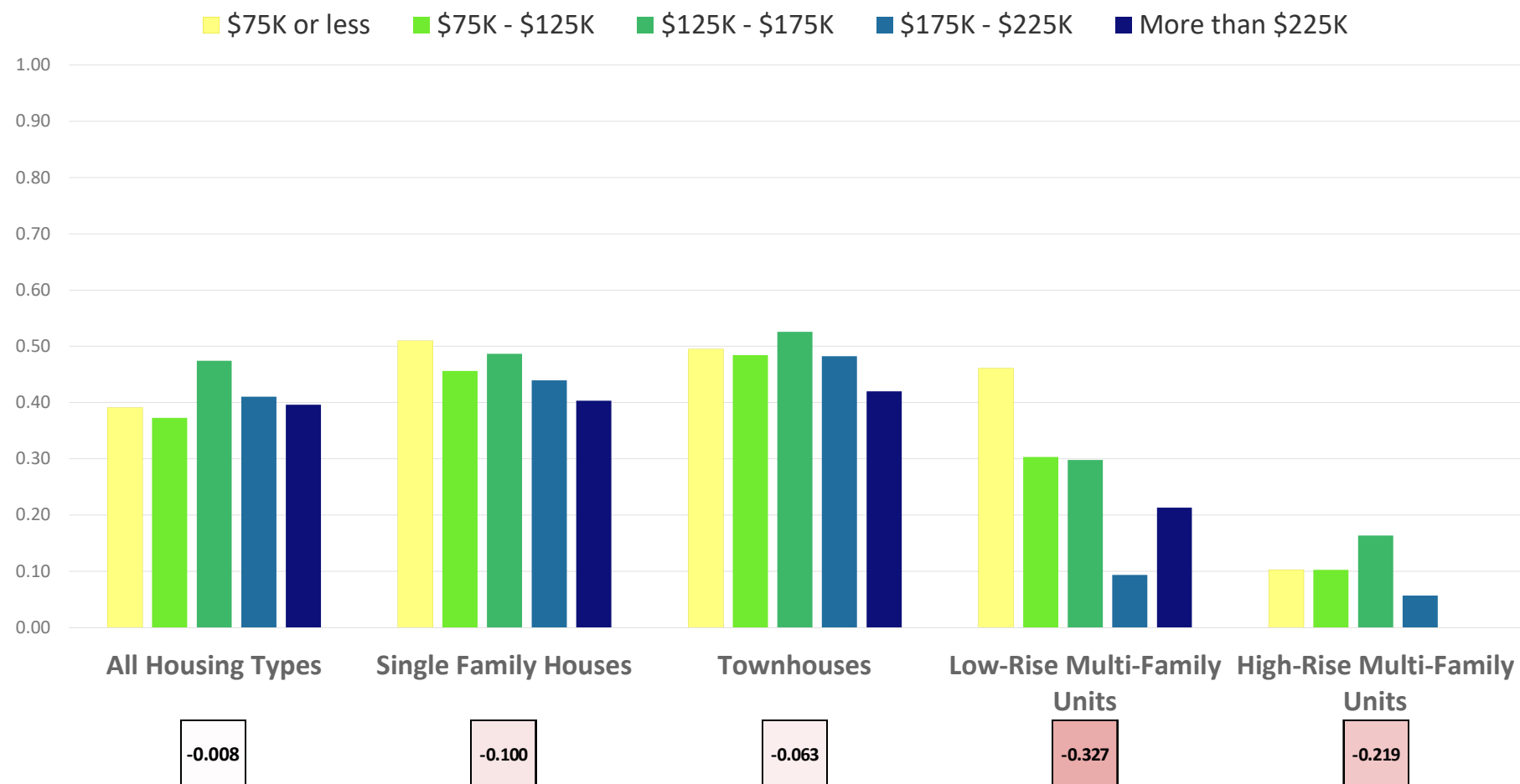
Student Generation Rate for Census Tracts by: Median Age and Housing Type



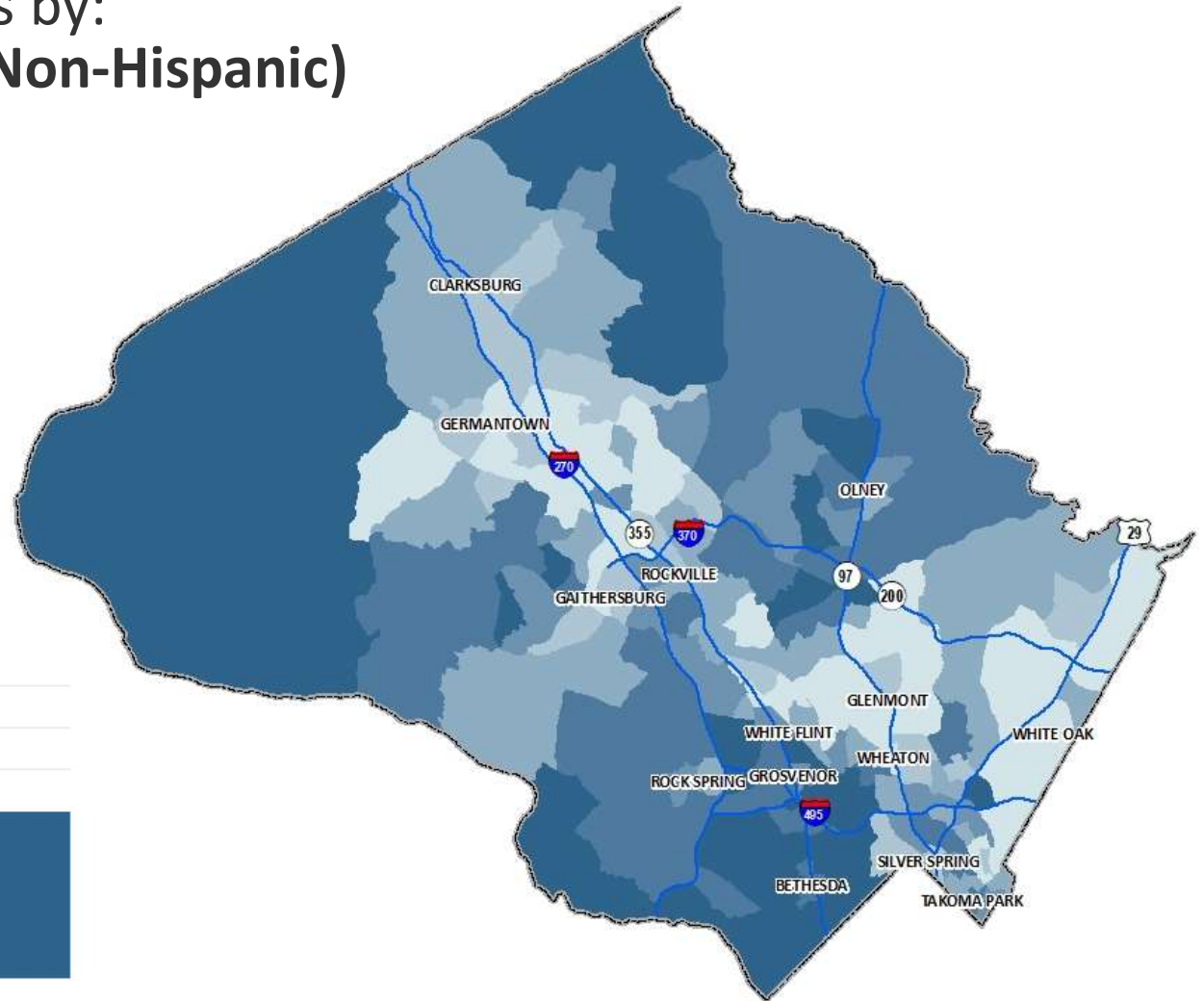
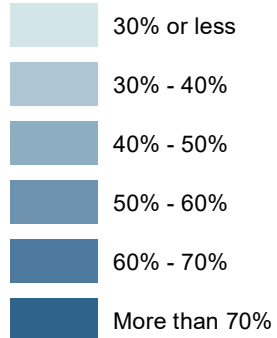
Distribution of Census Tracts by: Median Household Income



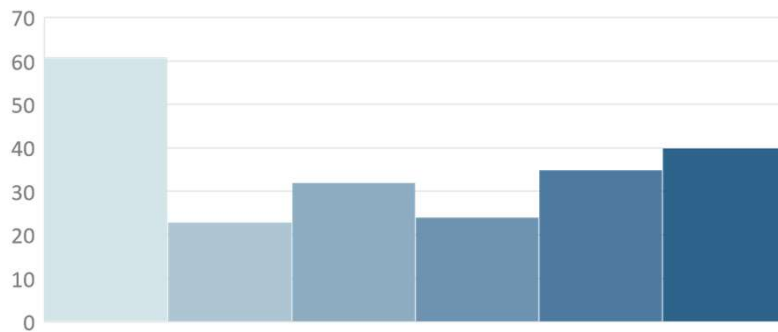
Student Generation Rate for Census Tracts by: Median Household Income and Housing Type



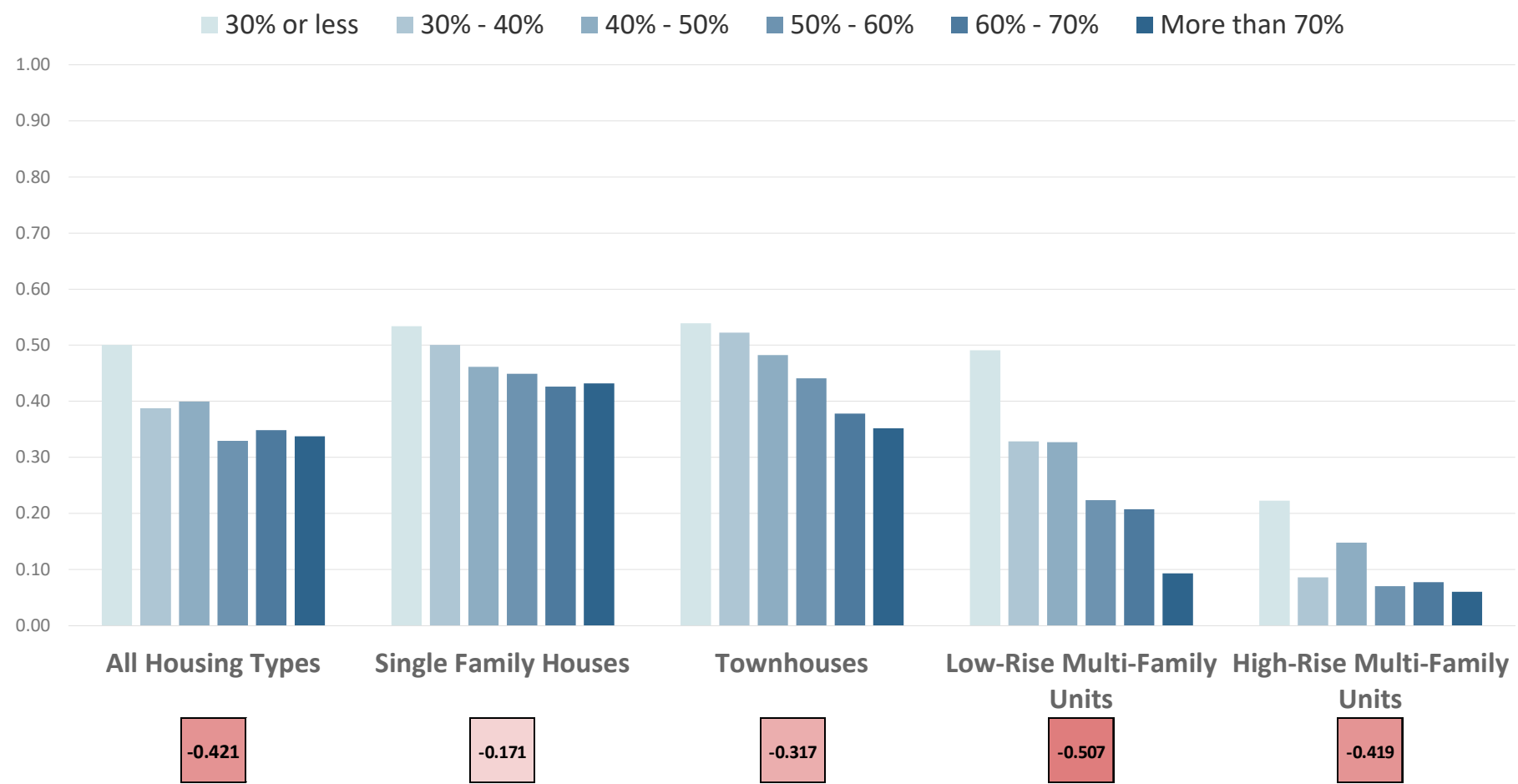
Distribution of Census Tracts by: % White Population (Non-Hispanic)



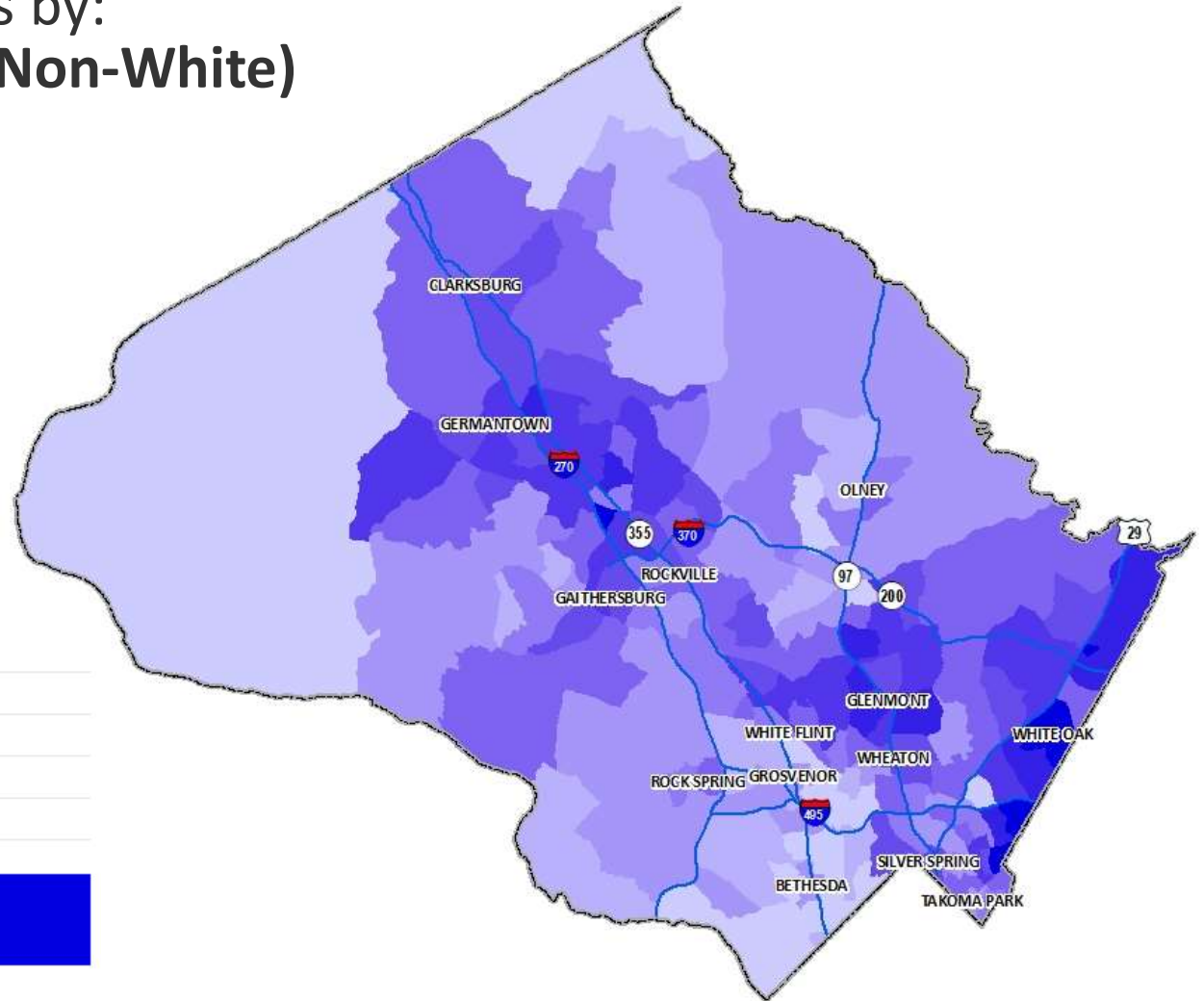
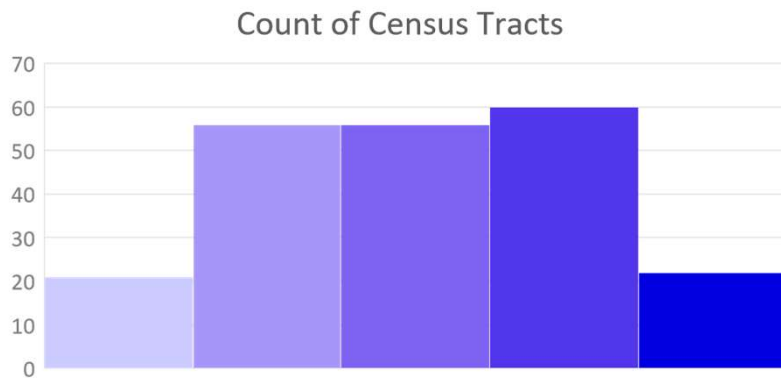
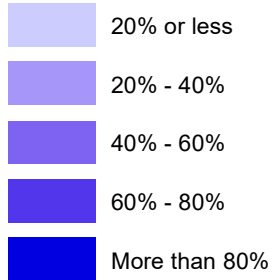
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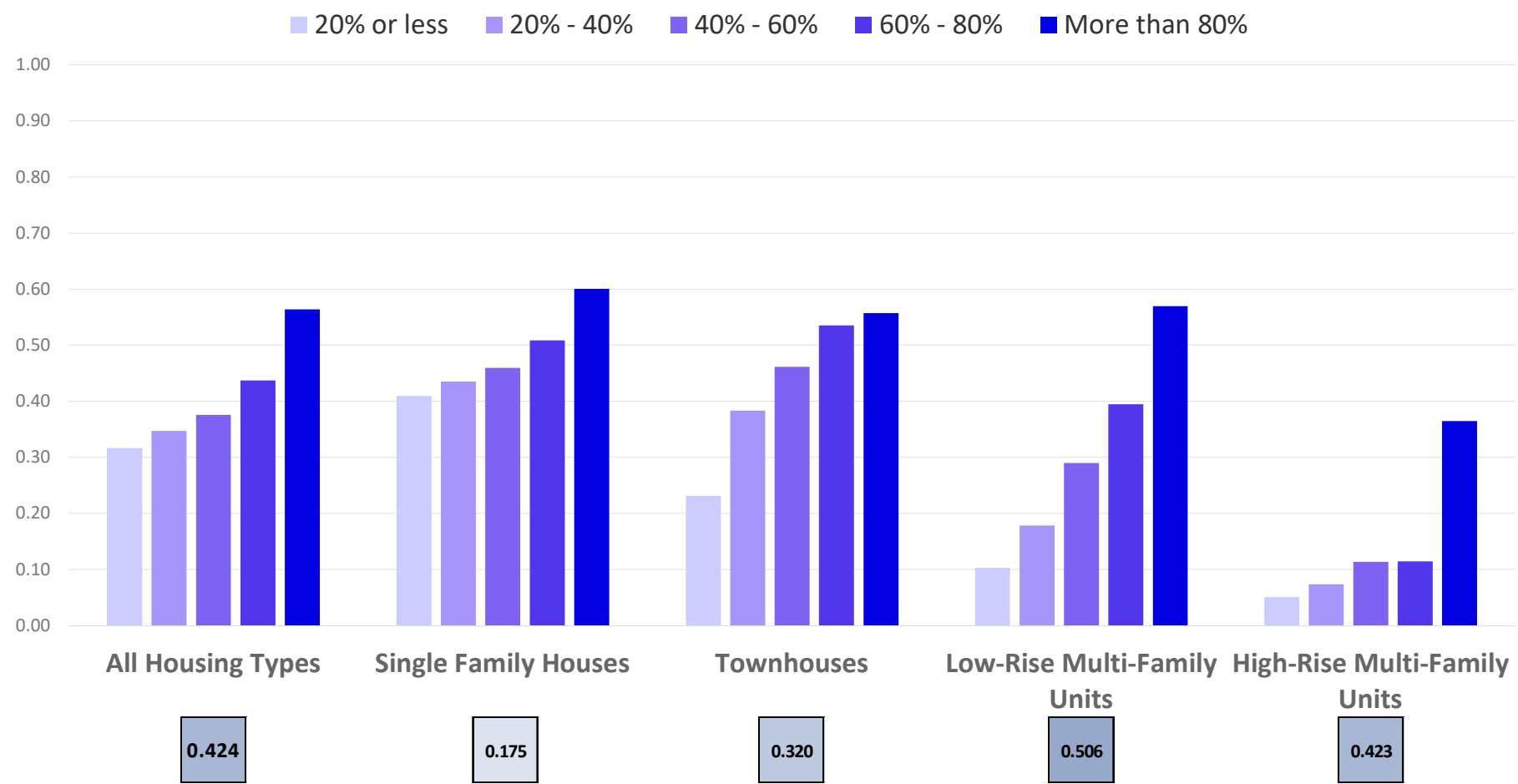
Student Generation Rate for Census Tracts by: % White Population (Non-Hispanic) and Housing Type



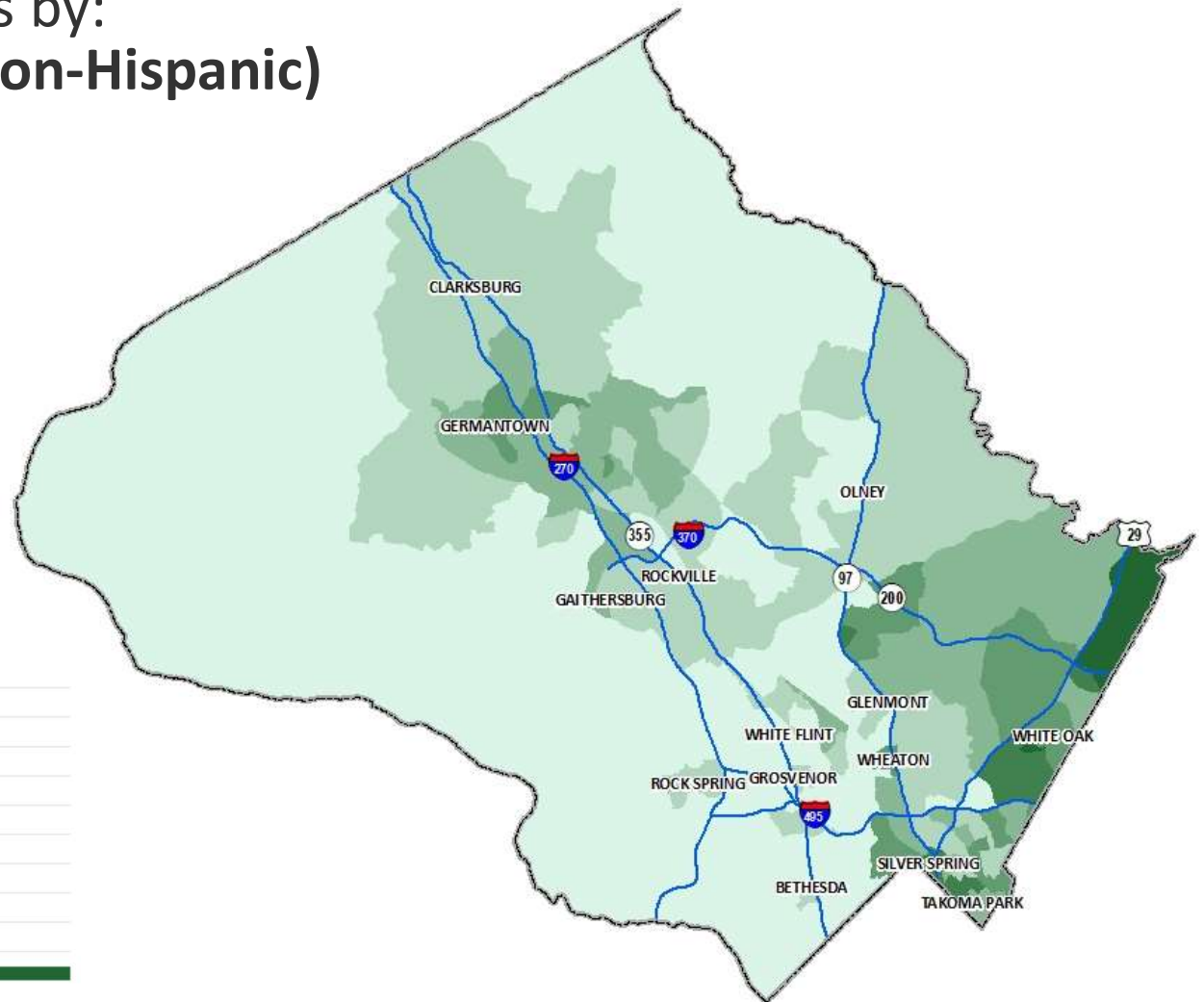
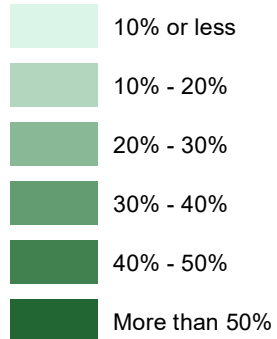
Distribution of Census Tracts by: % People of Color (All Non-White)



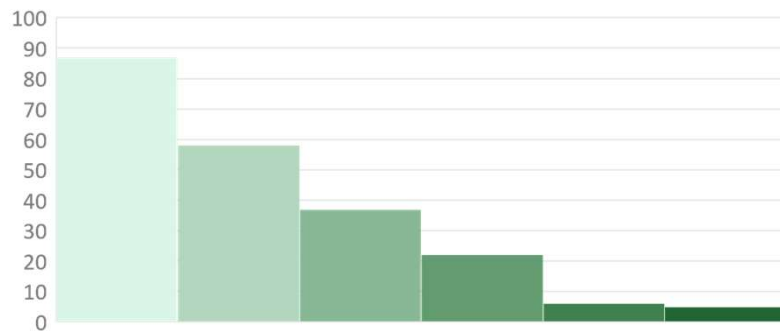
Student Generation Rate of Census Tracts by: % People of Color and Housing Type



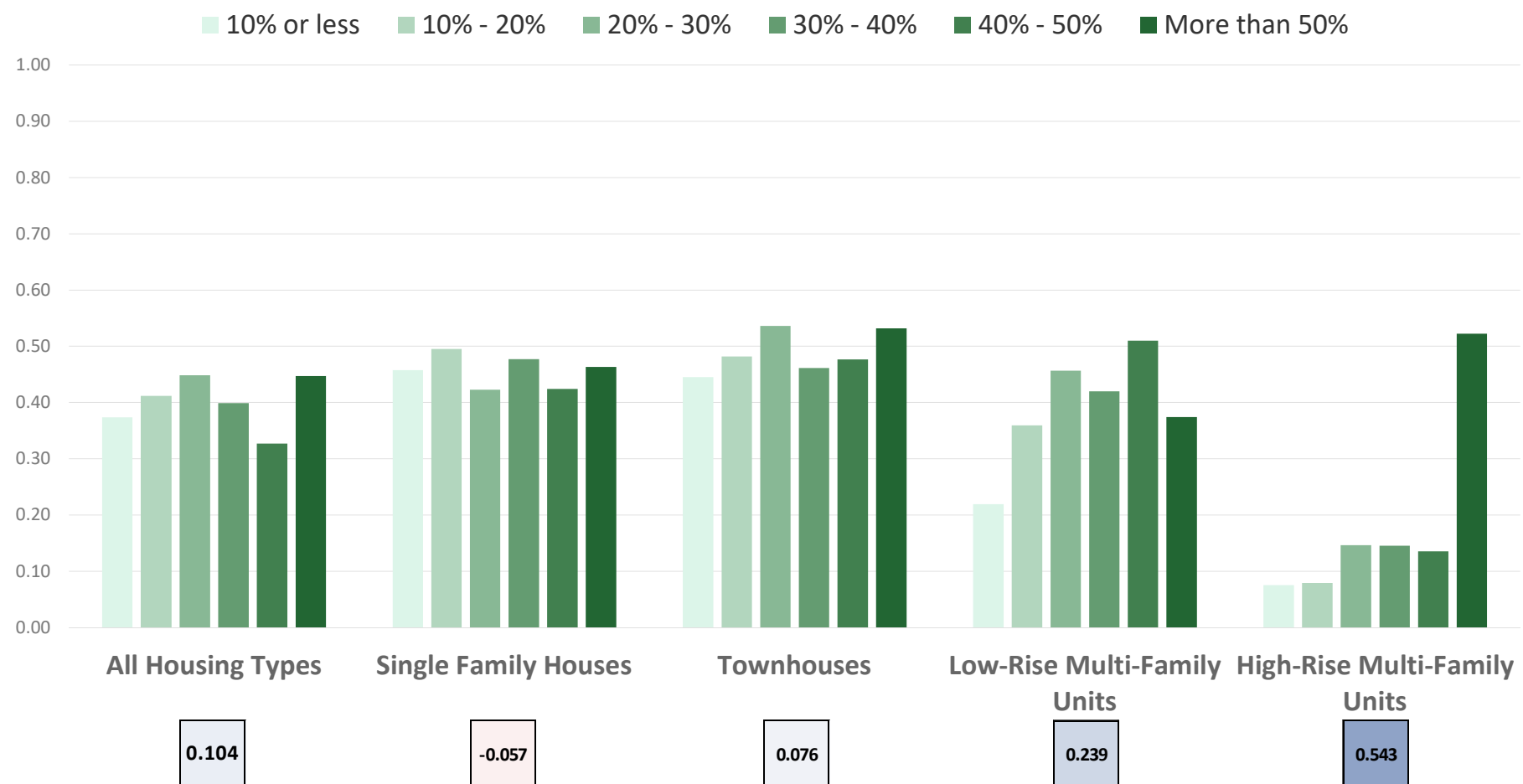
Distribution of Census Tracts by: % Black Population (Non-Hispanic)



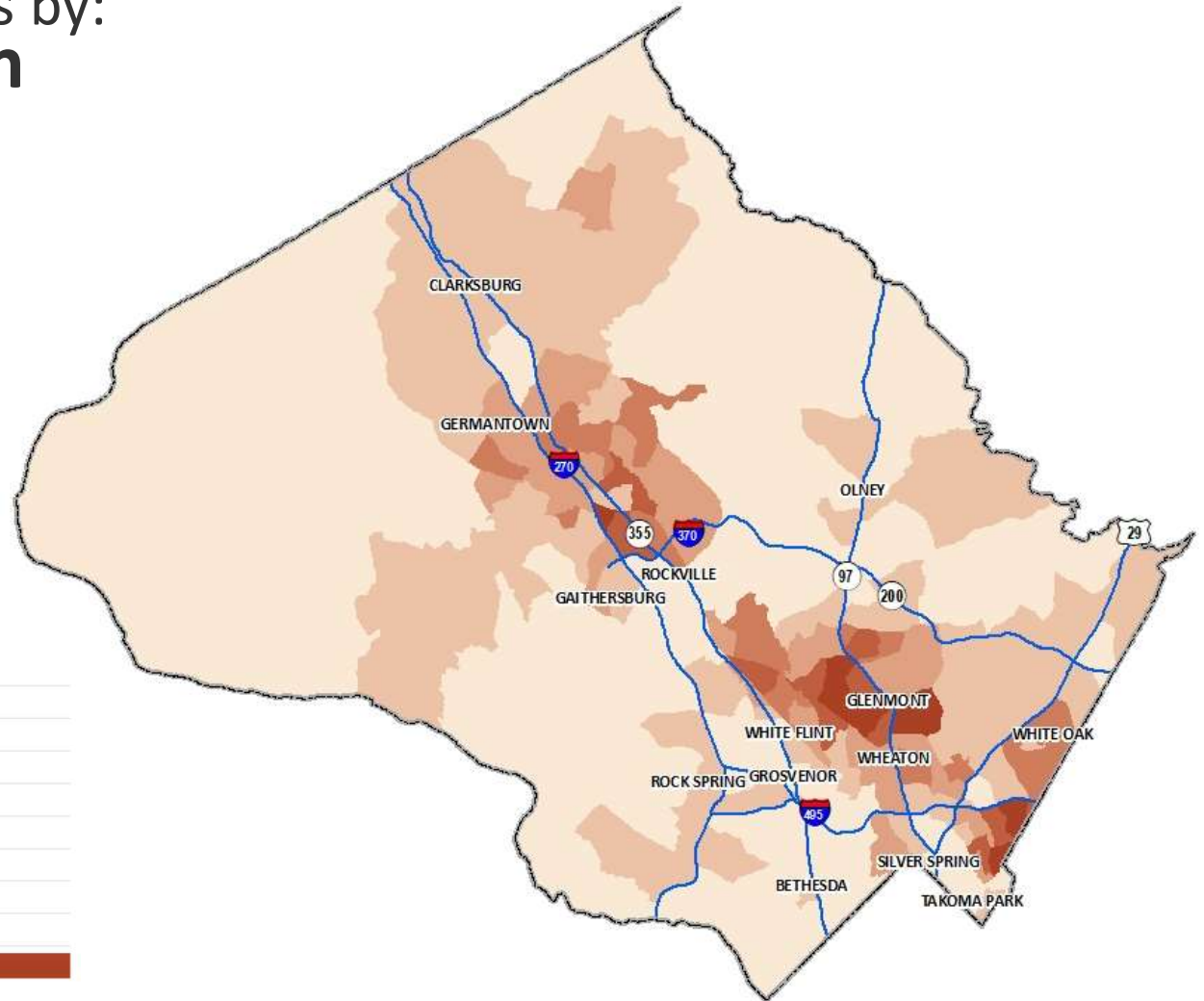
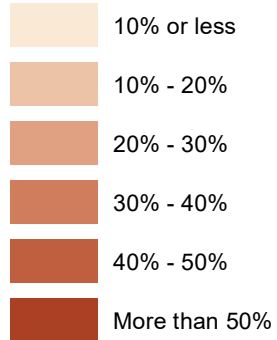
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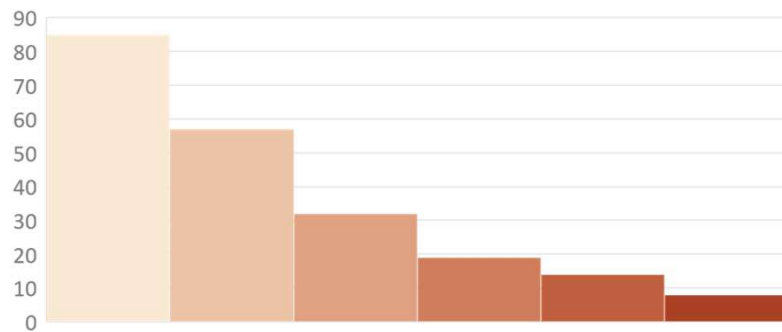
Student Generation Rate for Census Tracts by: % Black Population (Non-Hispanic) and Housing Type



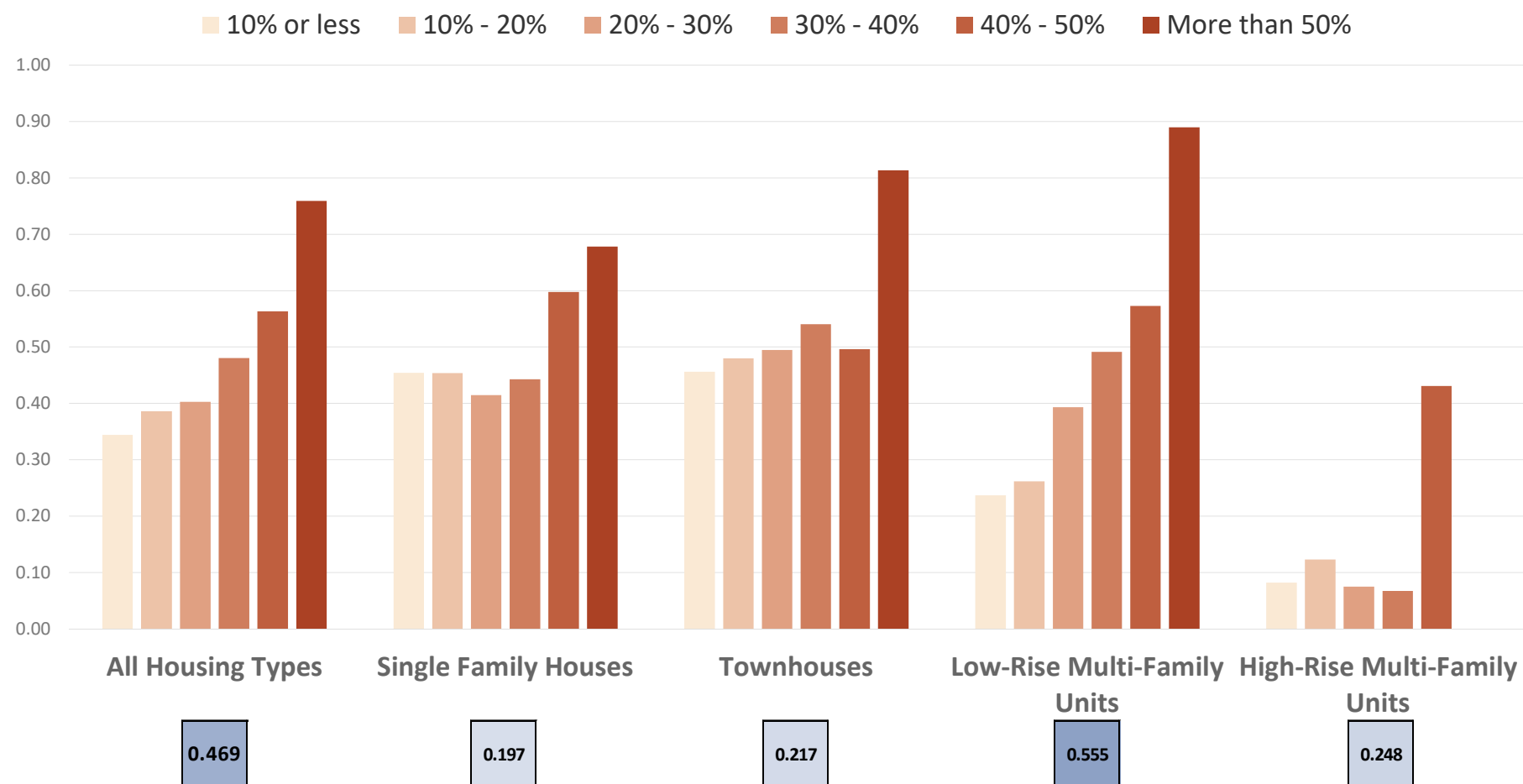
Distribution of Census Tracts by: % Hispanic Population



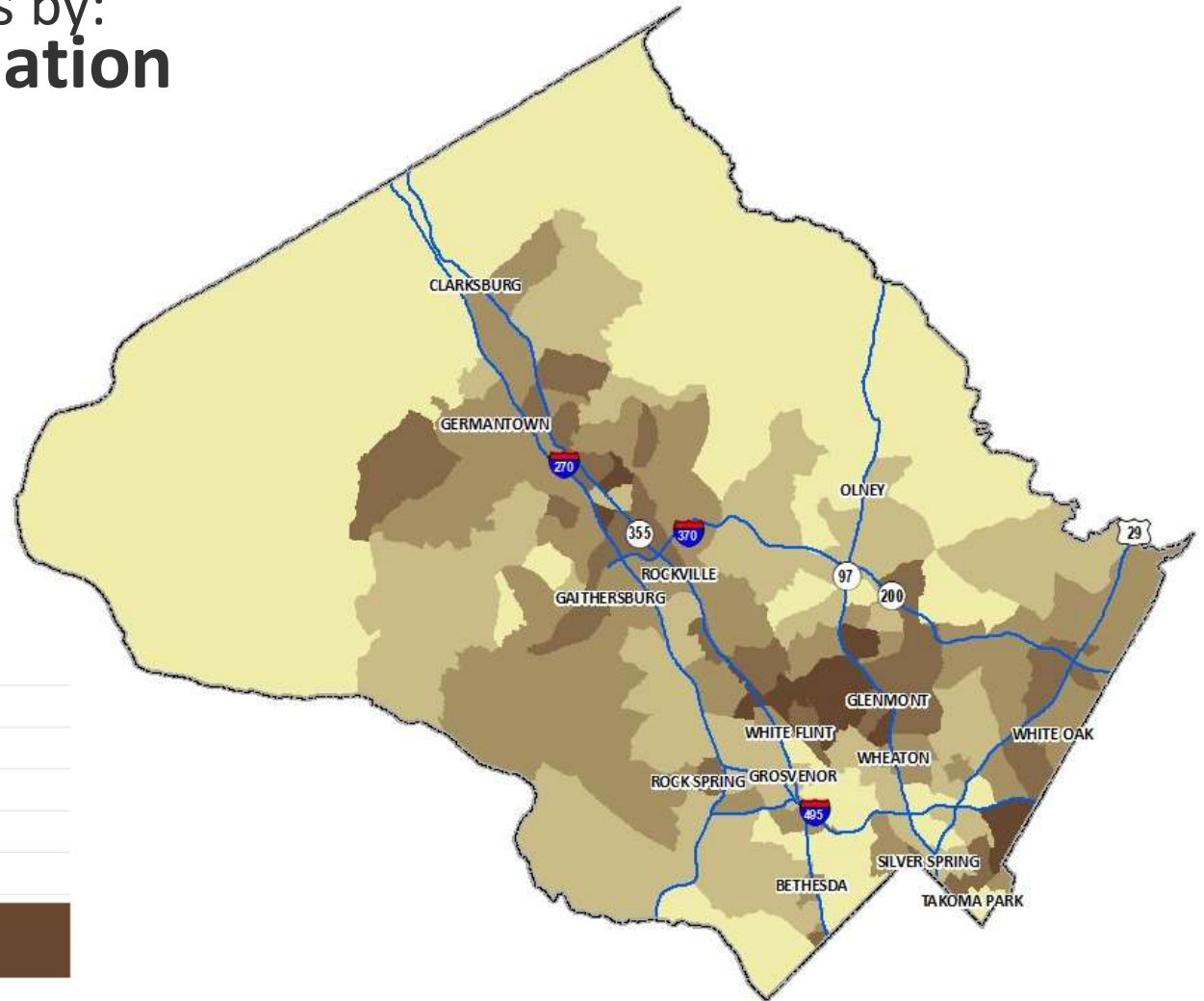
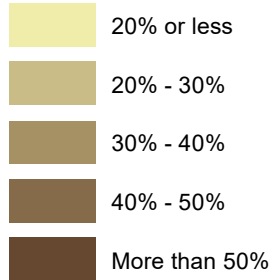
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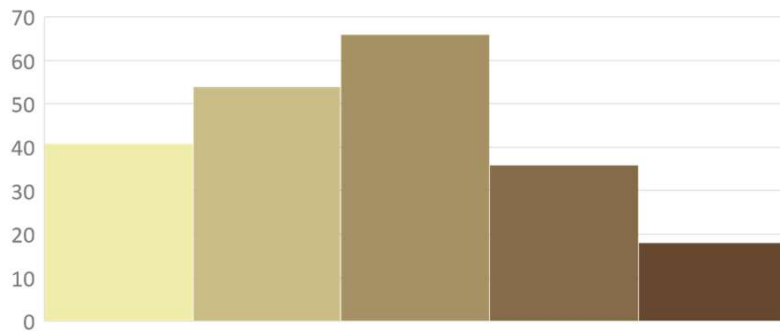
Student Generation Rate for Census Tracts by: % Hispanic Population and Housing Type



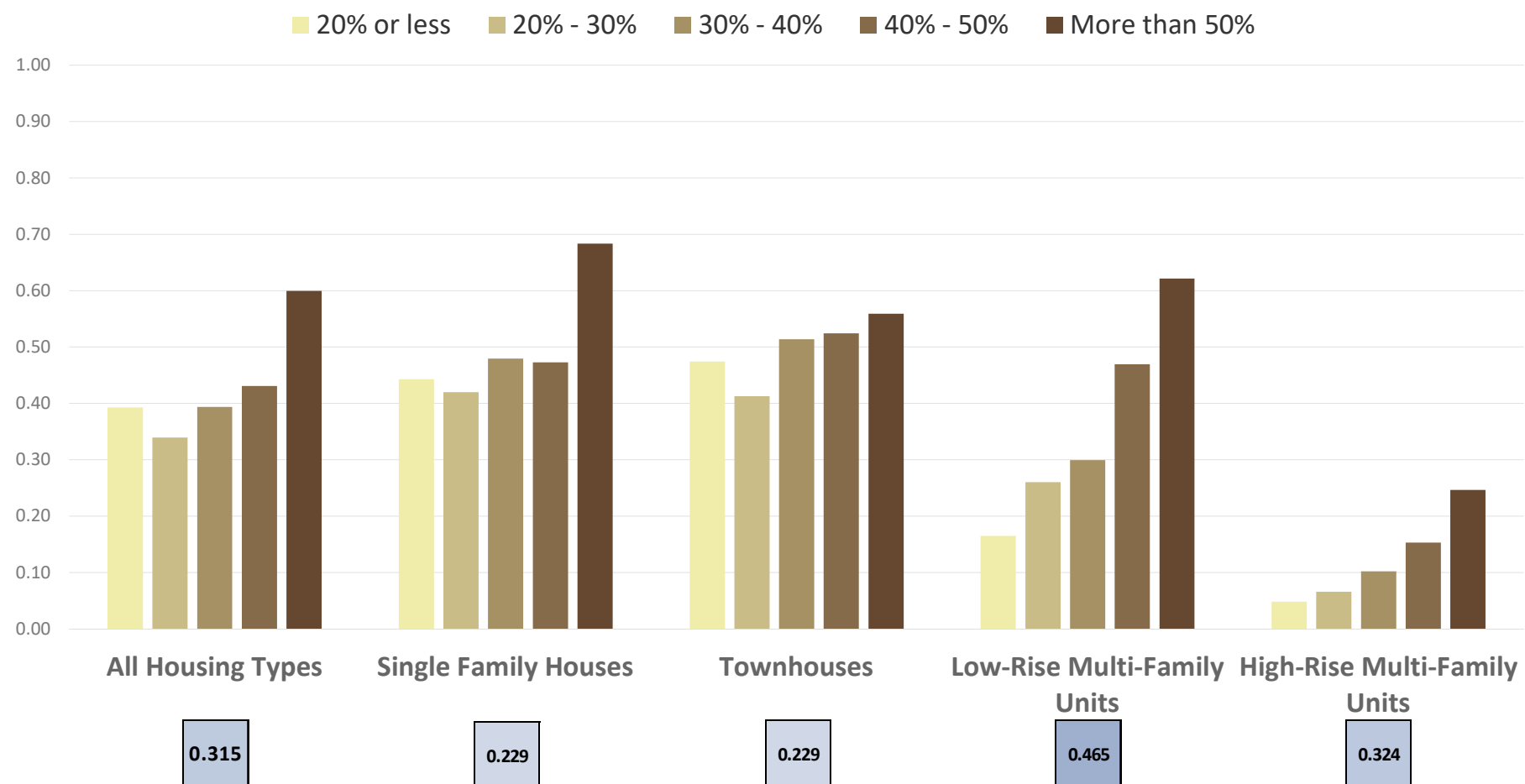
Distribution of Census Tracts by: % Foreign-Born Population



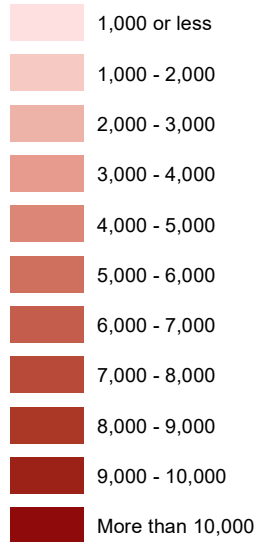
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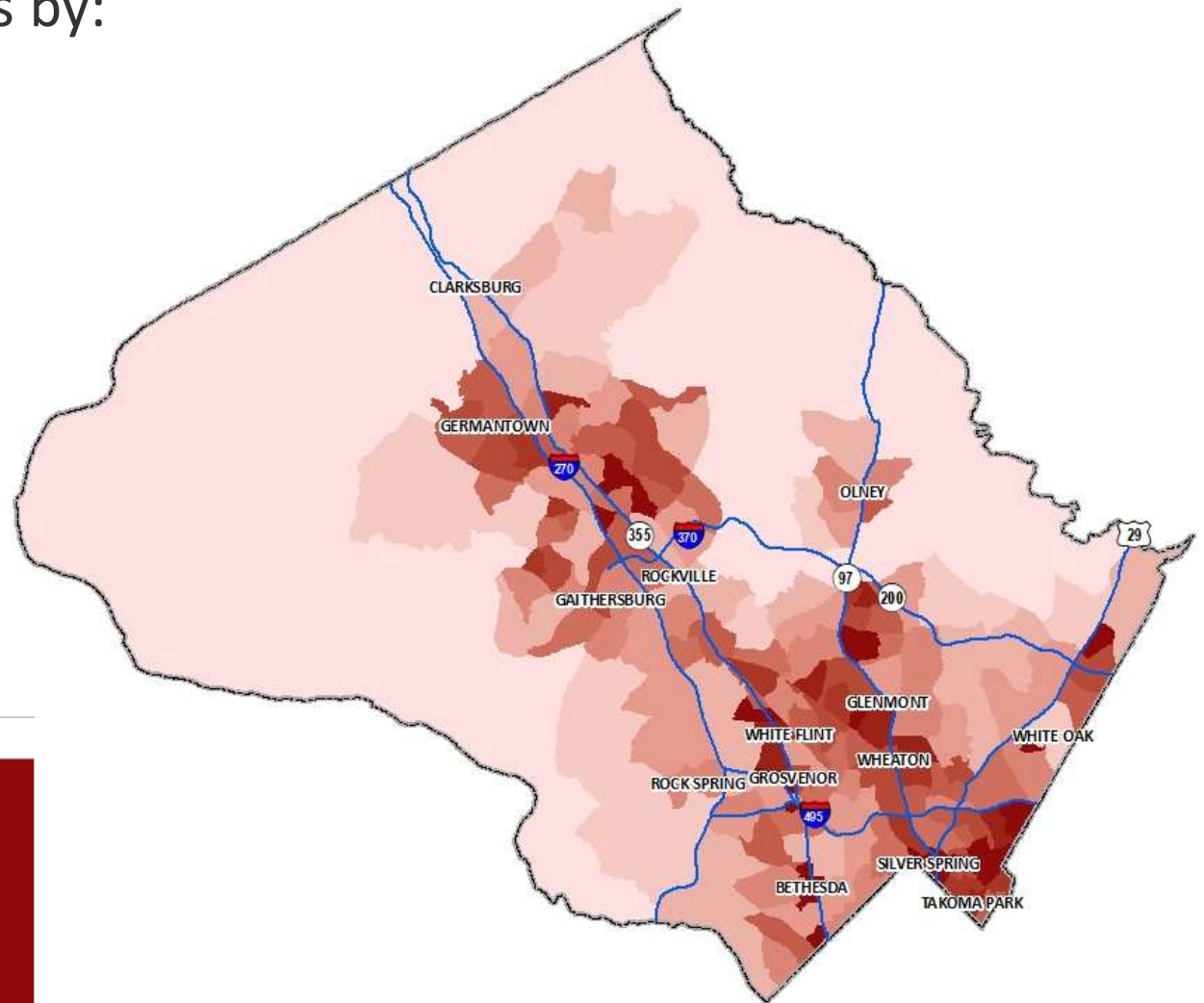
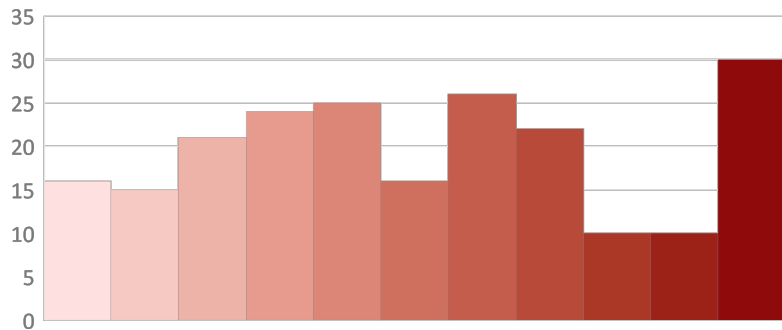
Student Generation Rate for Census Tracts by: % Foreign-Born Population and Housing Type



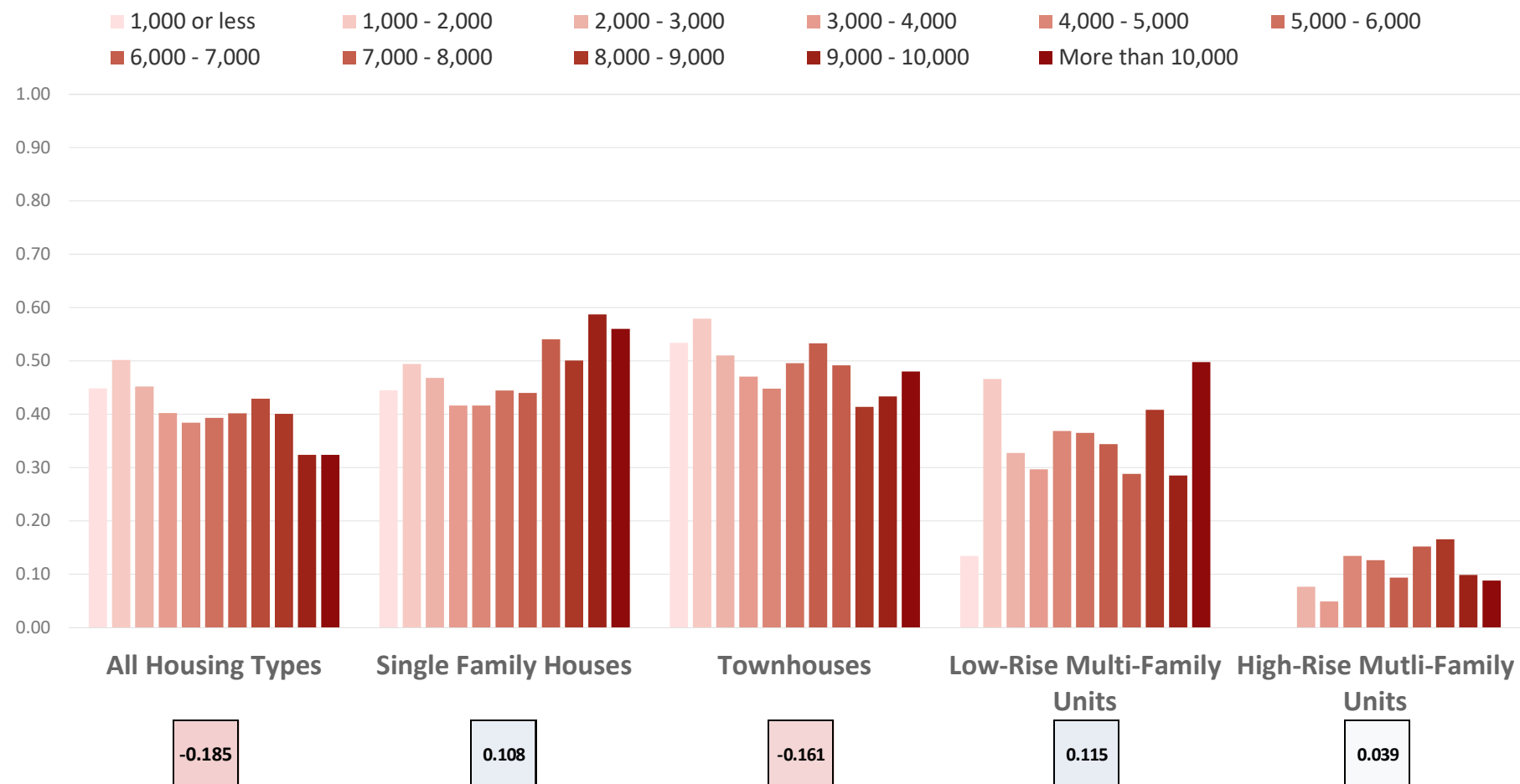
Distribution of Census Tracts by: Population Density



Count of Census Tracts



Student Generation Rate for Census Tracts by: Population Density and Housing Type

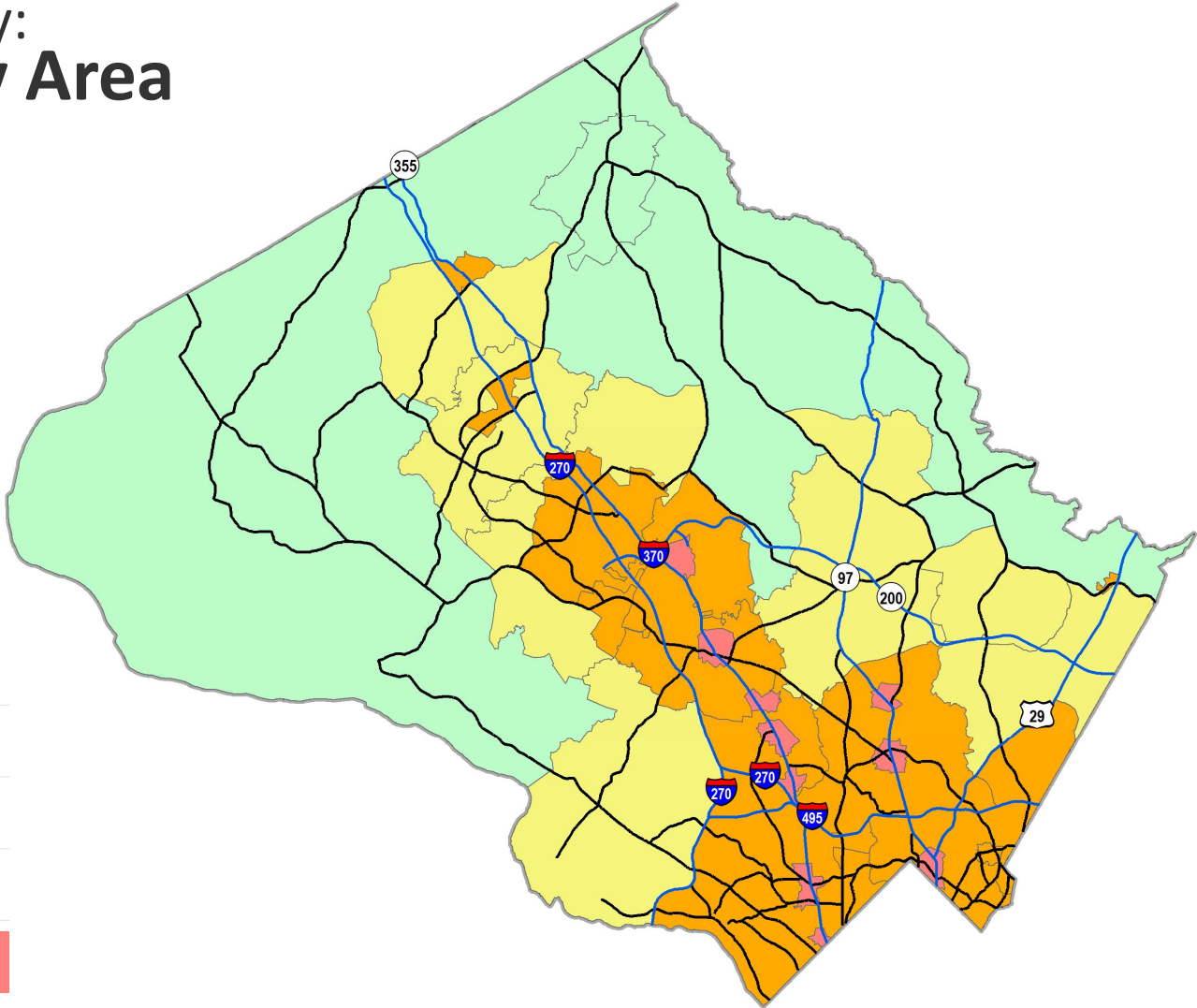
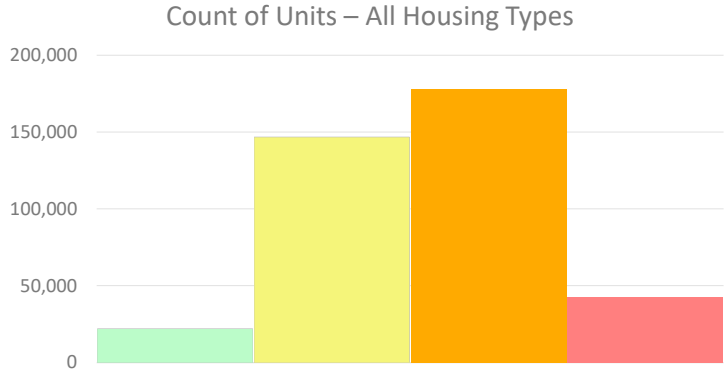


Location-Based SGRs

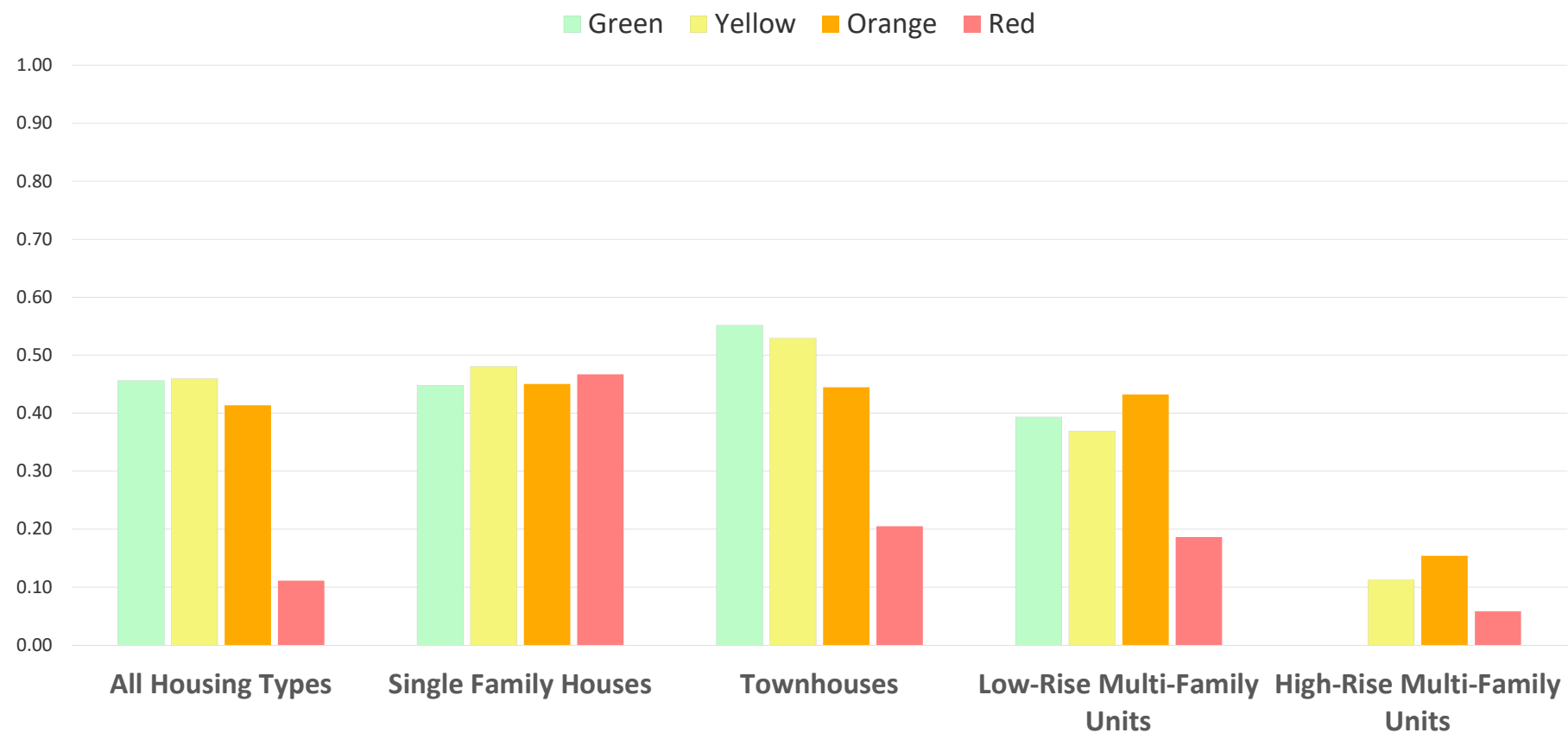
Student Generation Rate by: Transportation Policy Area Classification

Policy Area Categories

- Green
- Orange
- Red
- Yellow

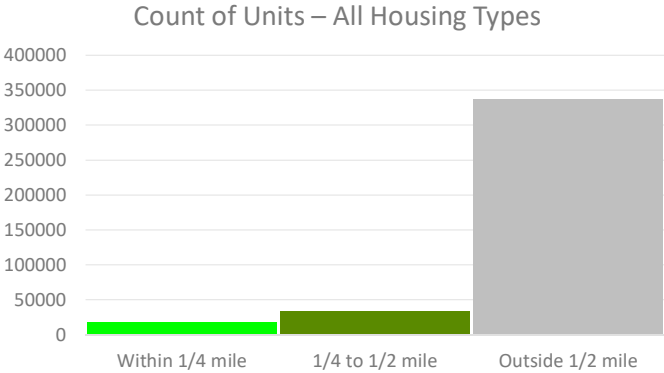
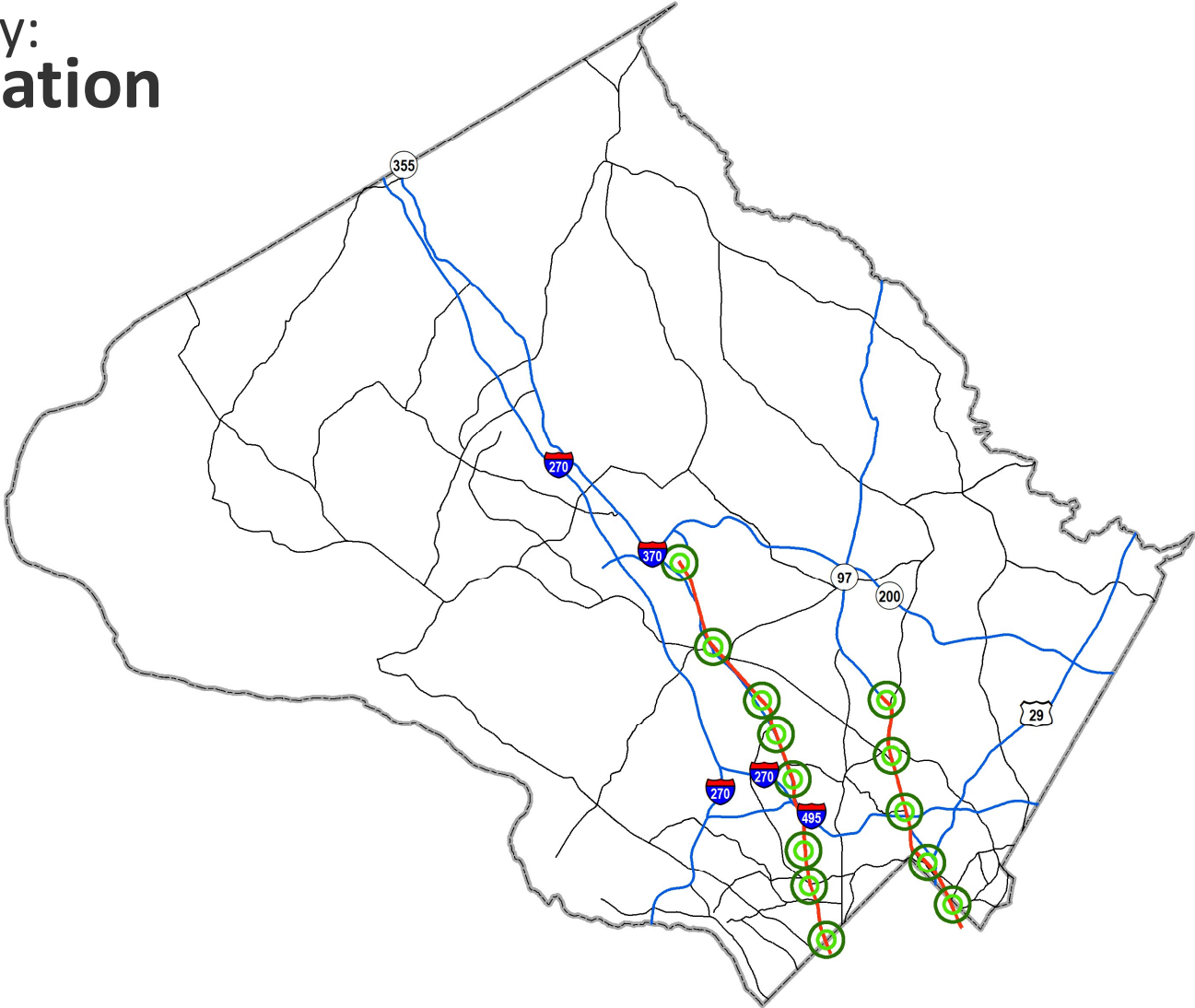


Student Generation Rate by: Transportation Policy Area Classification

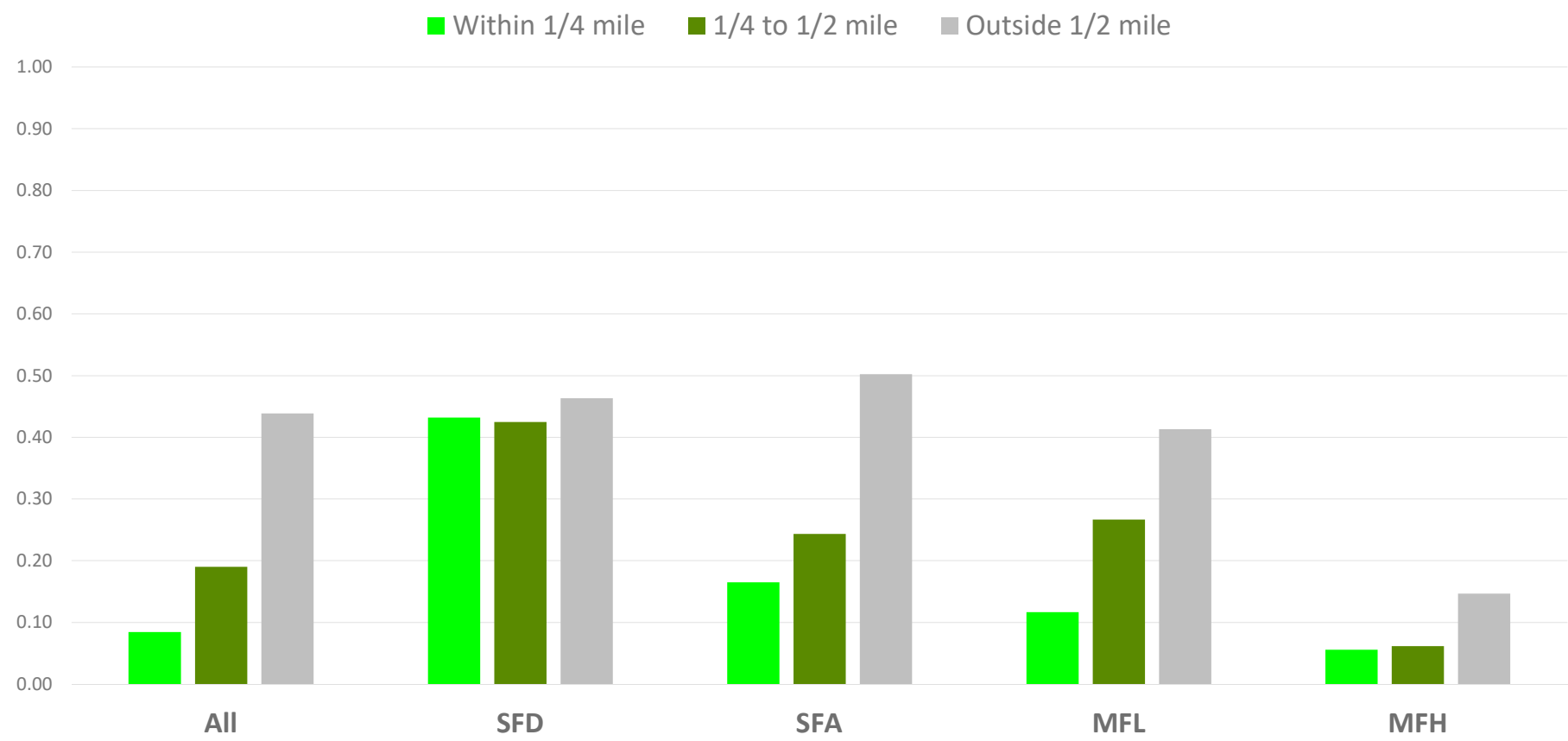


Student Generation Rate by: Distance to Metro Station

- Quarter Mile Metro Station Area
- Half Mile Metro Station Area

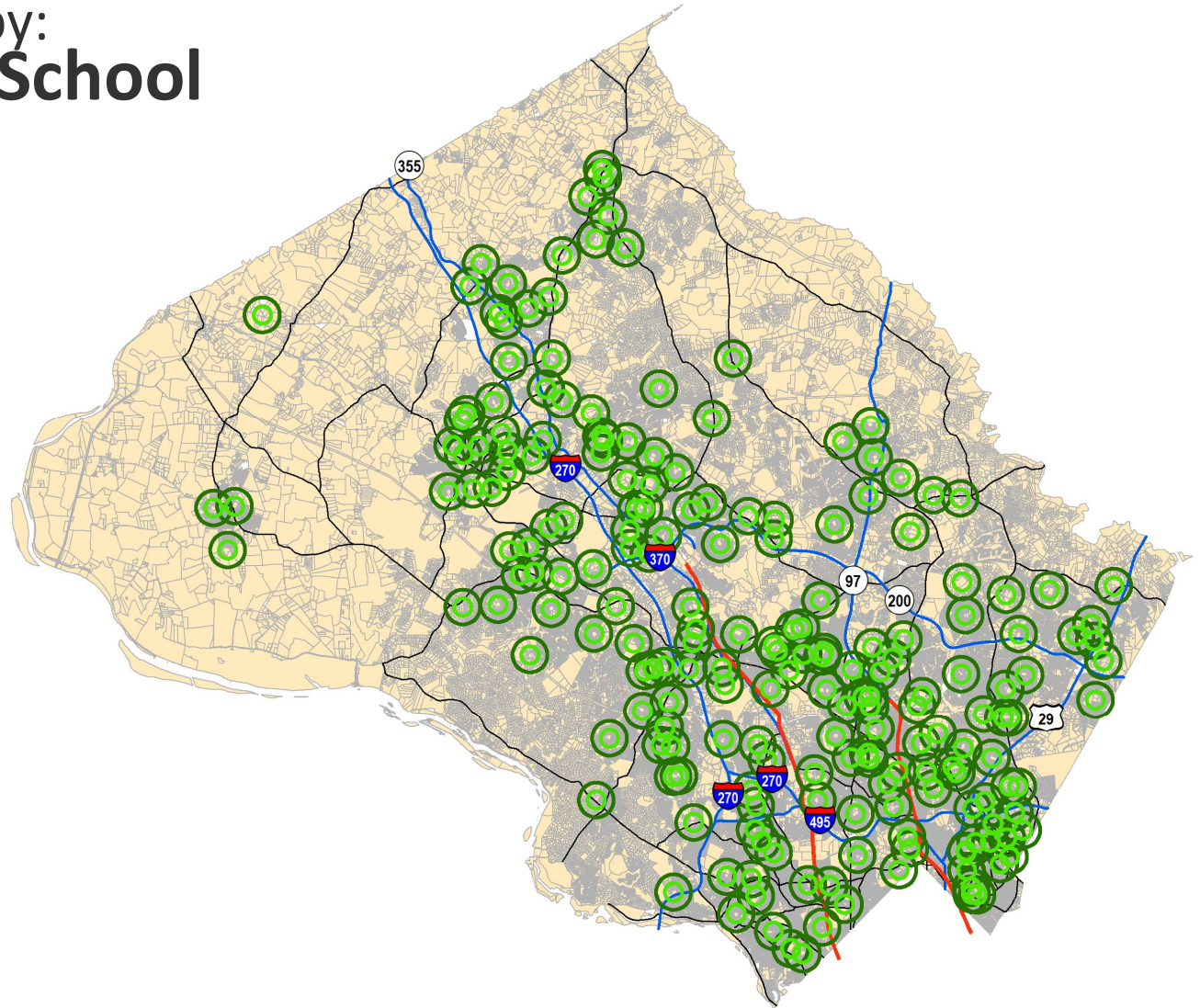


Student Generation Rate by: Distance to Metro Station

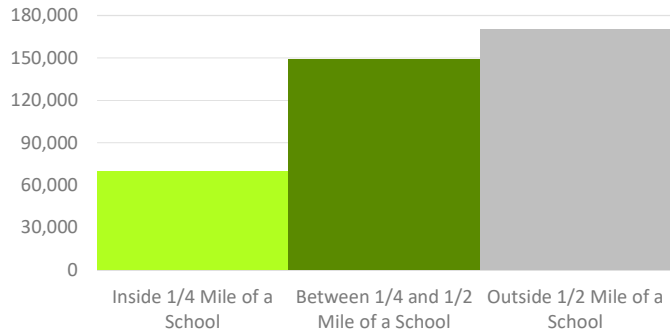


Student Generation Rate by: Distance to Nearest School

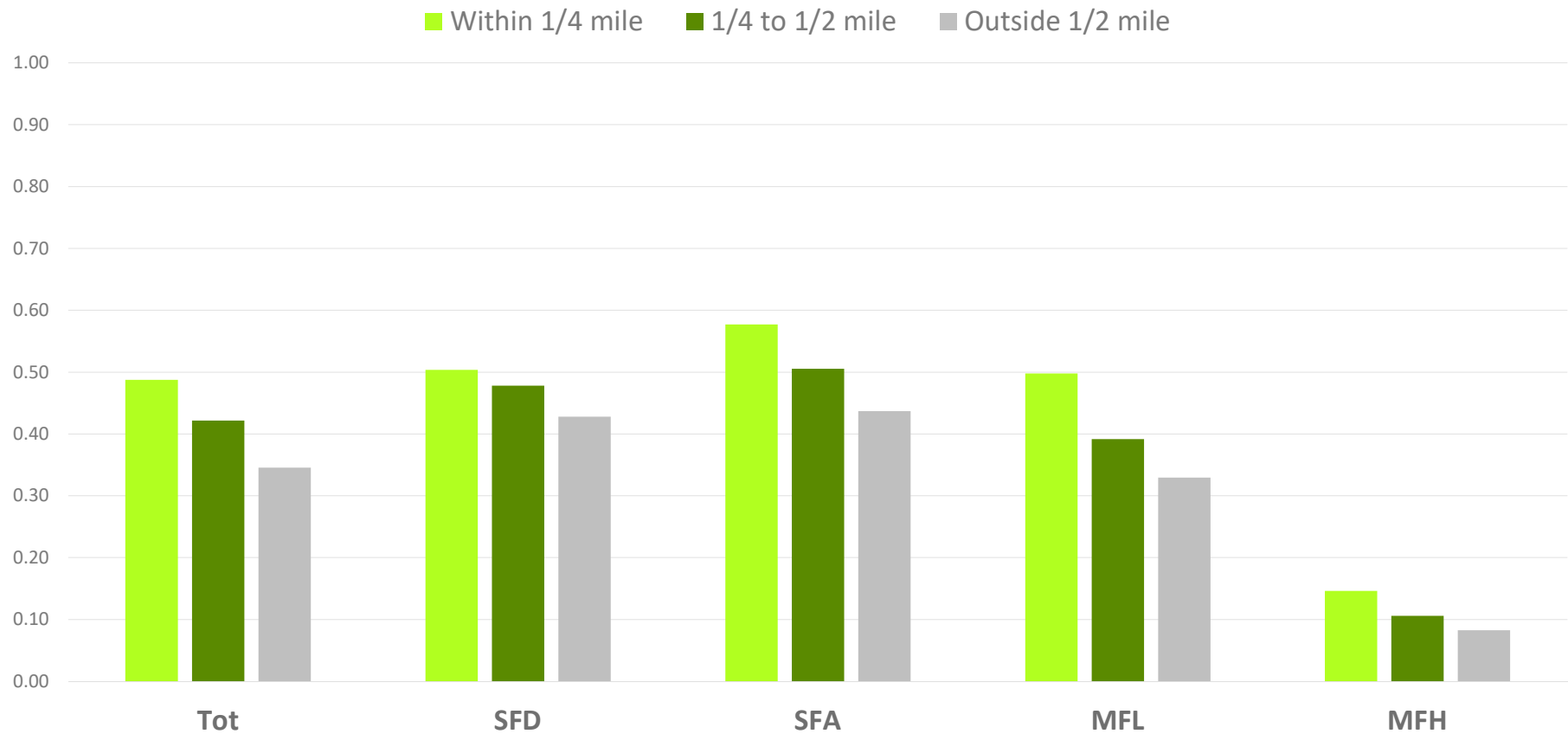
- Quarter Mile School Buffer
- Half Mile School Buffer



Count of Units – All Housing Types

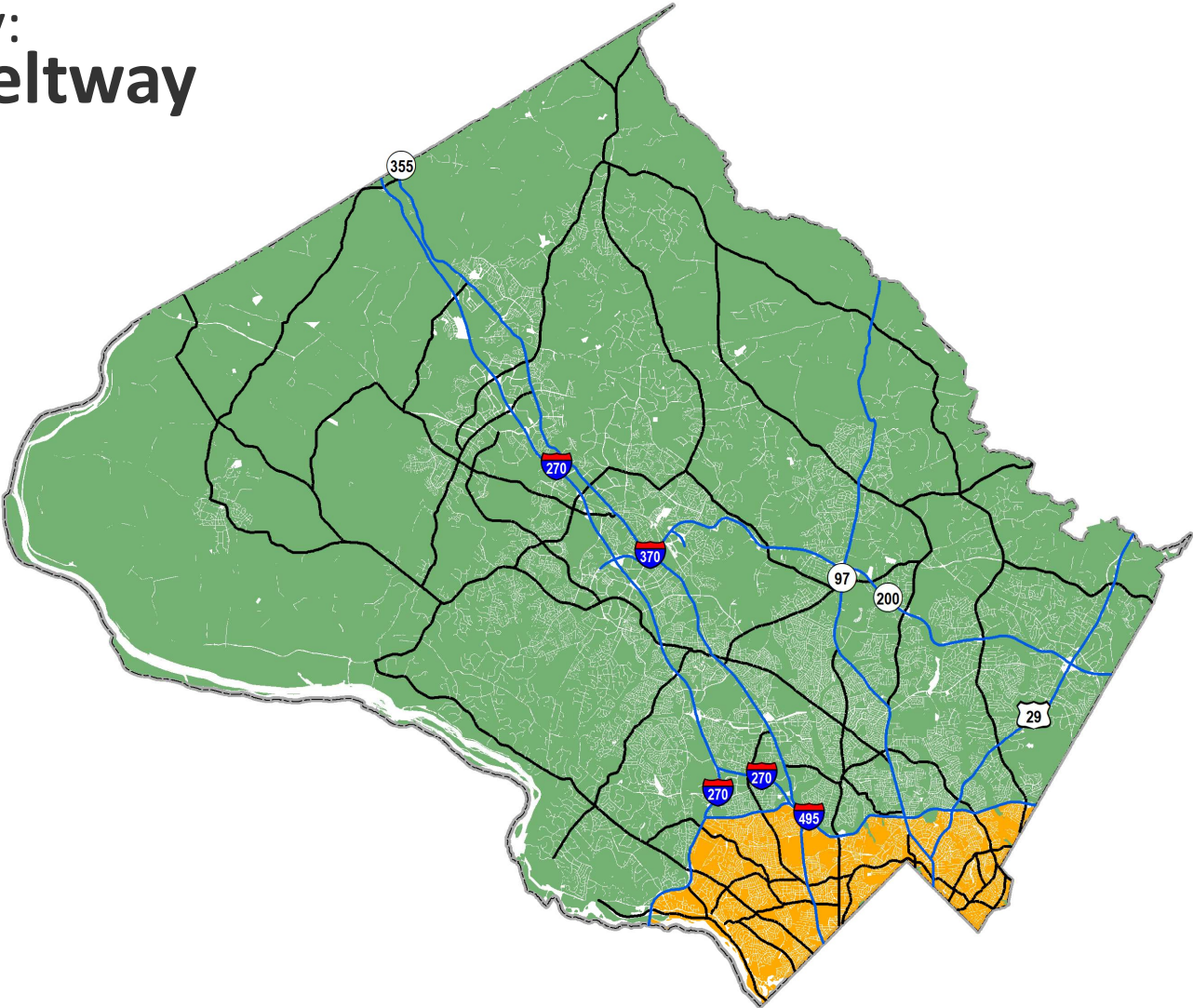


Student Generation Rate by: Distance to Nearest School

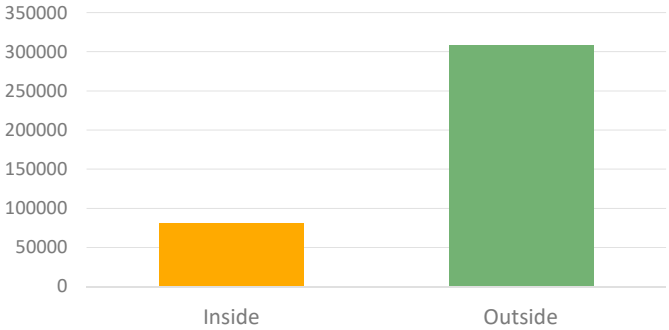


Student Generation Rate by: Inside/Outside the Beltway

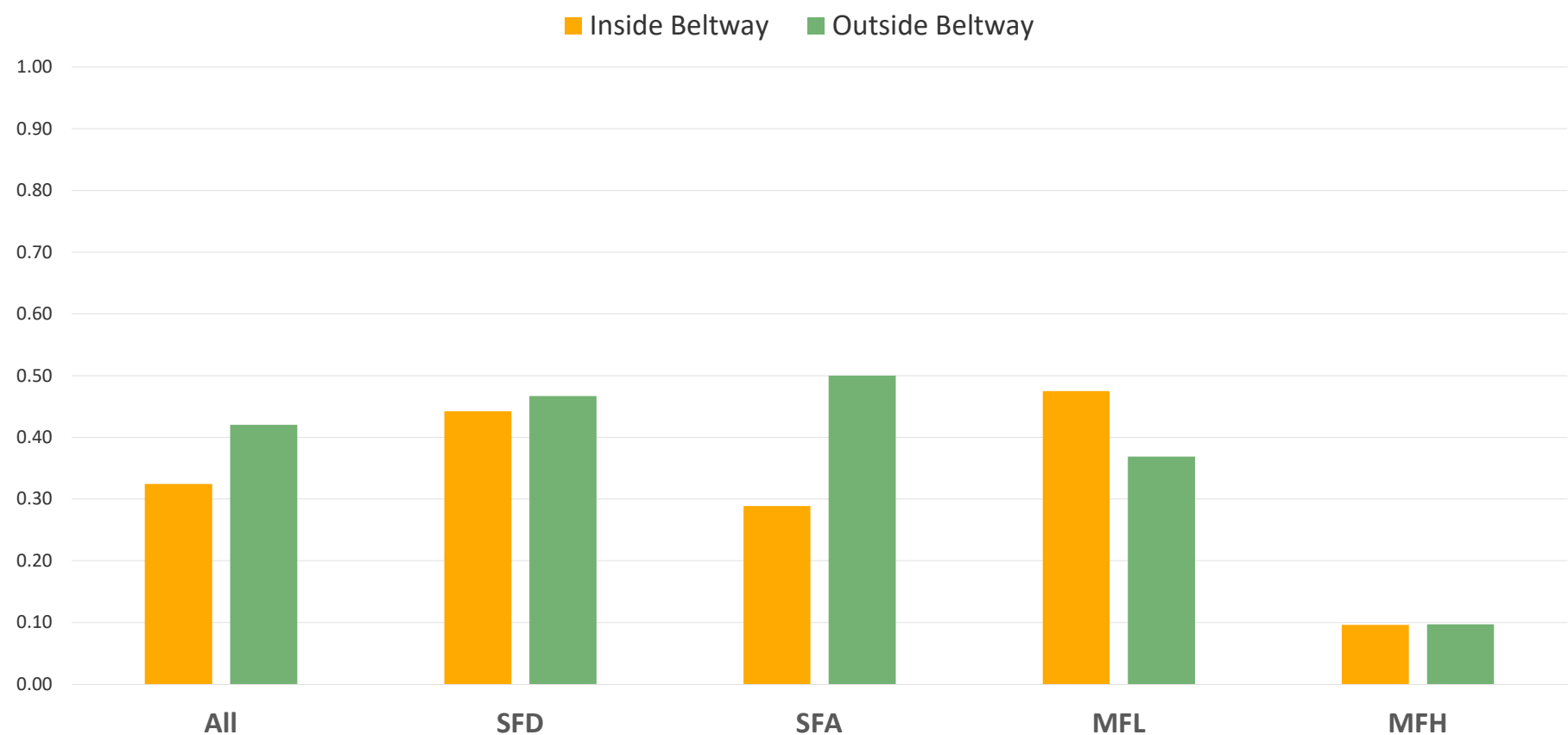
- Inside Beltway
- Outside Beltway



Count of Units – All Housing Types



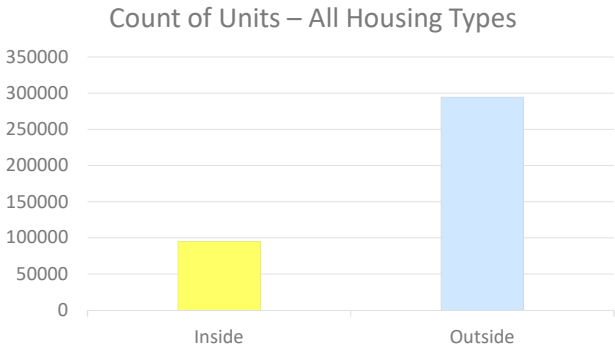
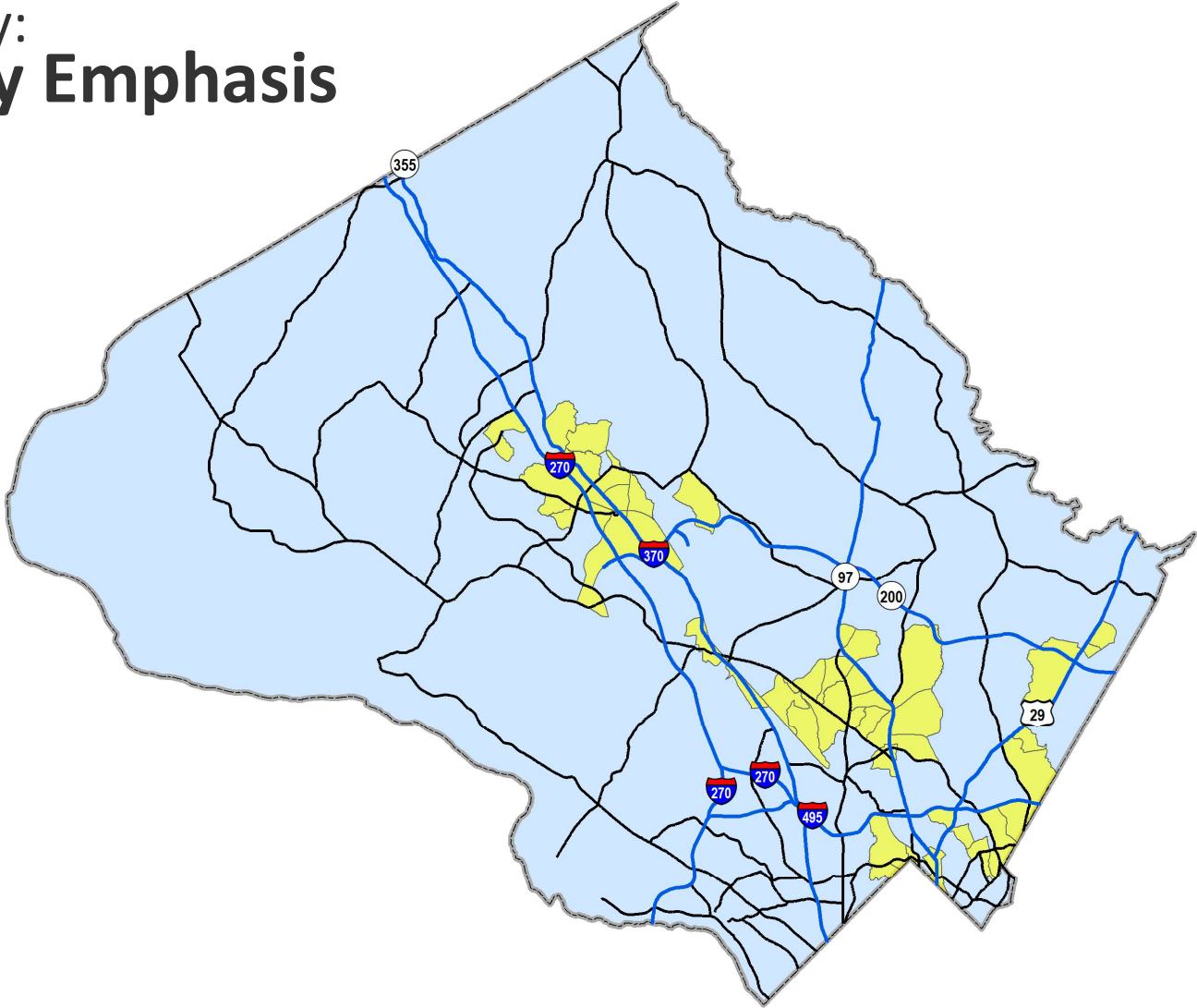
Student Generation Rate by: Inside/Outside the Beltway



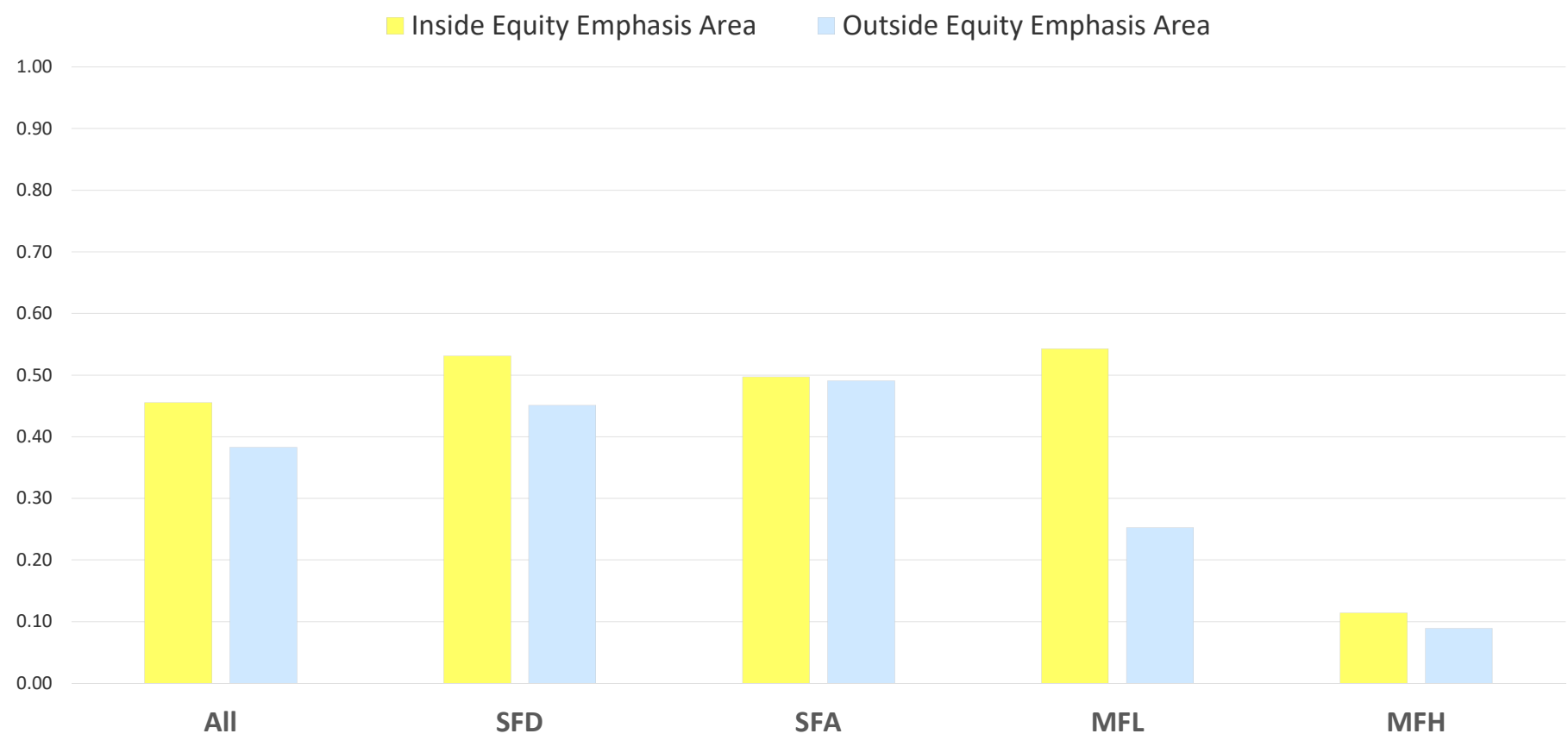
Student Generation Rate by: Inside/Outside Equity Emphasis Areas

- Equity Emphasis Area
- Non-Emphasis Area

Equity Emphasis Areas are defined by the Metropolitan Washington Area Council of Governments as Census tracts with higher than average concentration of low-income, minority populations, or both.



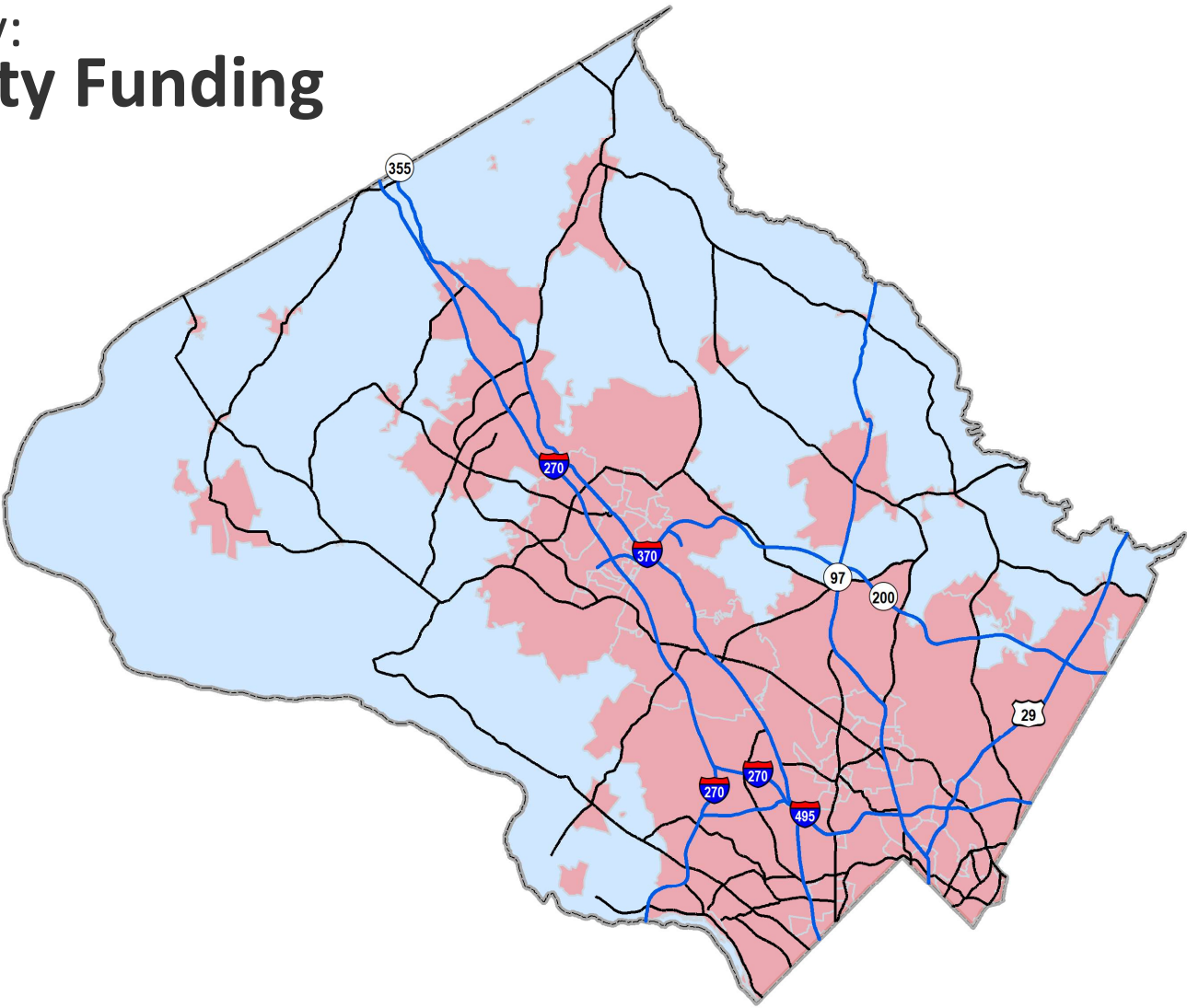
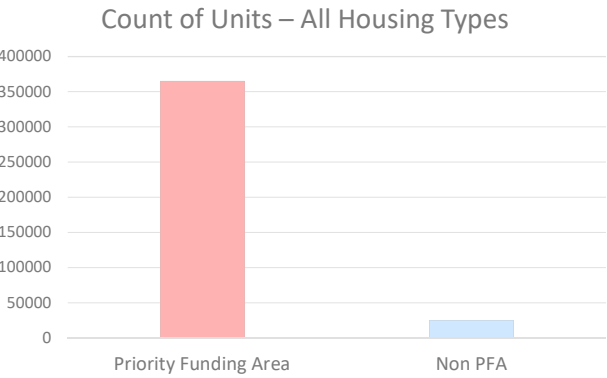
Student Generation Rate by: Inside/Outside Equity Emphasis Areas



Student Generation Rate by: Inside/Outside Priority Funding Areas

- Priority Funding Areas
- Non-Priority Area

Priority Funding Areas are designated smart growth areas identified by the county and certified by the state as eligible for state infrastructure funding.



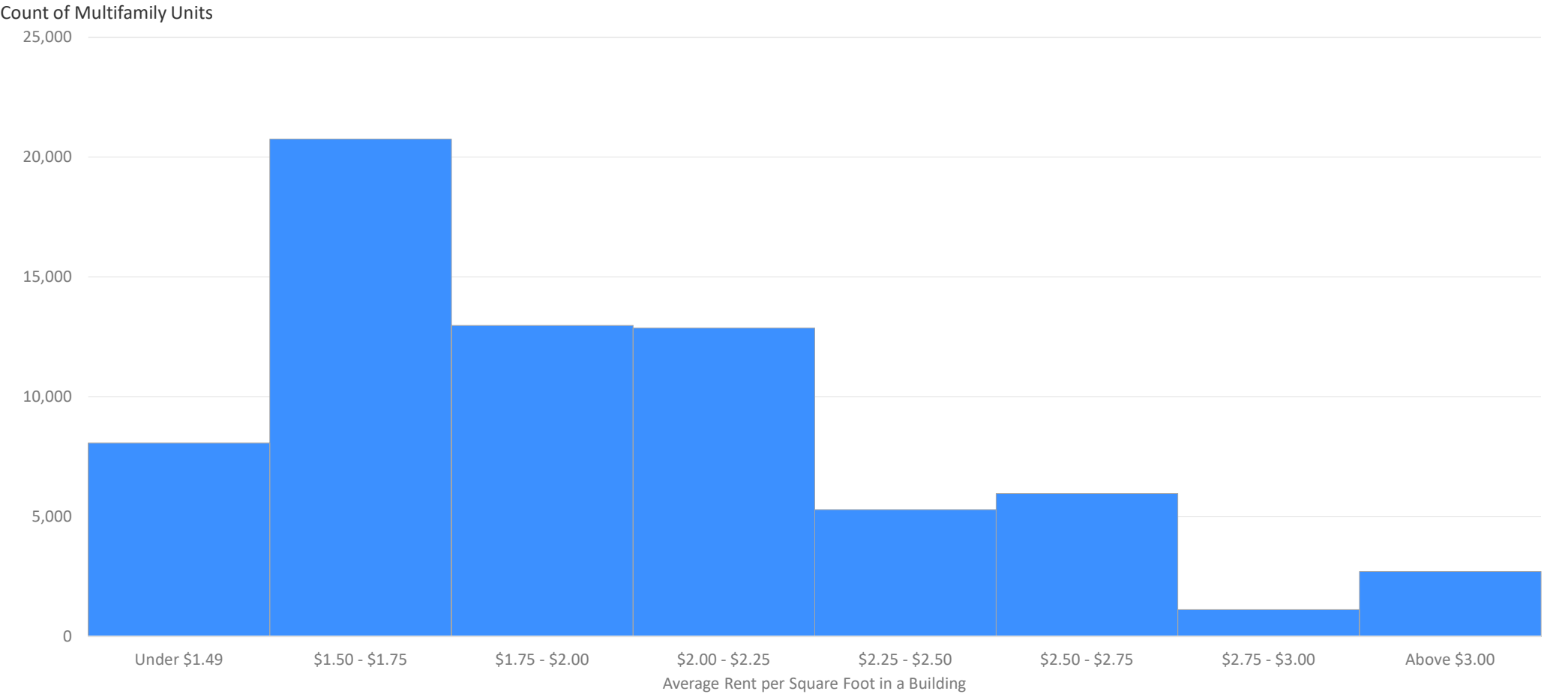
Student Generation Rate by: Inside/Outside Priority Funding Areas



Dwelling-Based SGRs

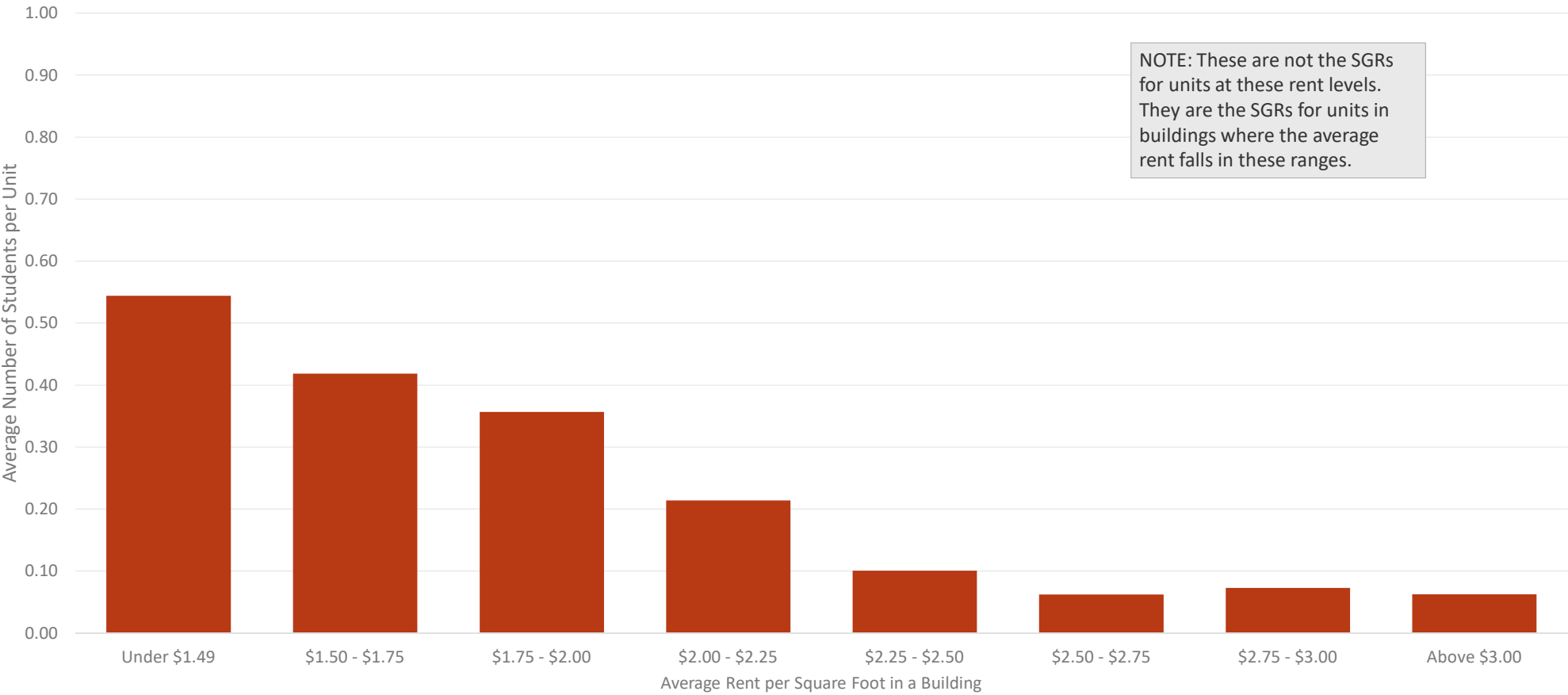
Average Rent per Square Foot

Multifamily dwelling units



SGR by Average Rent per Square Foot

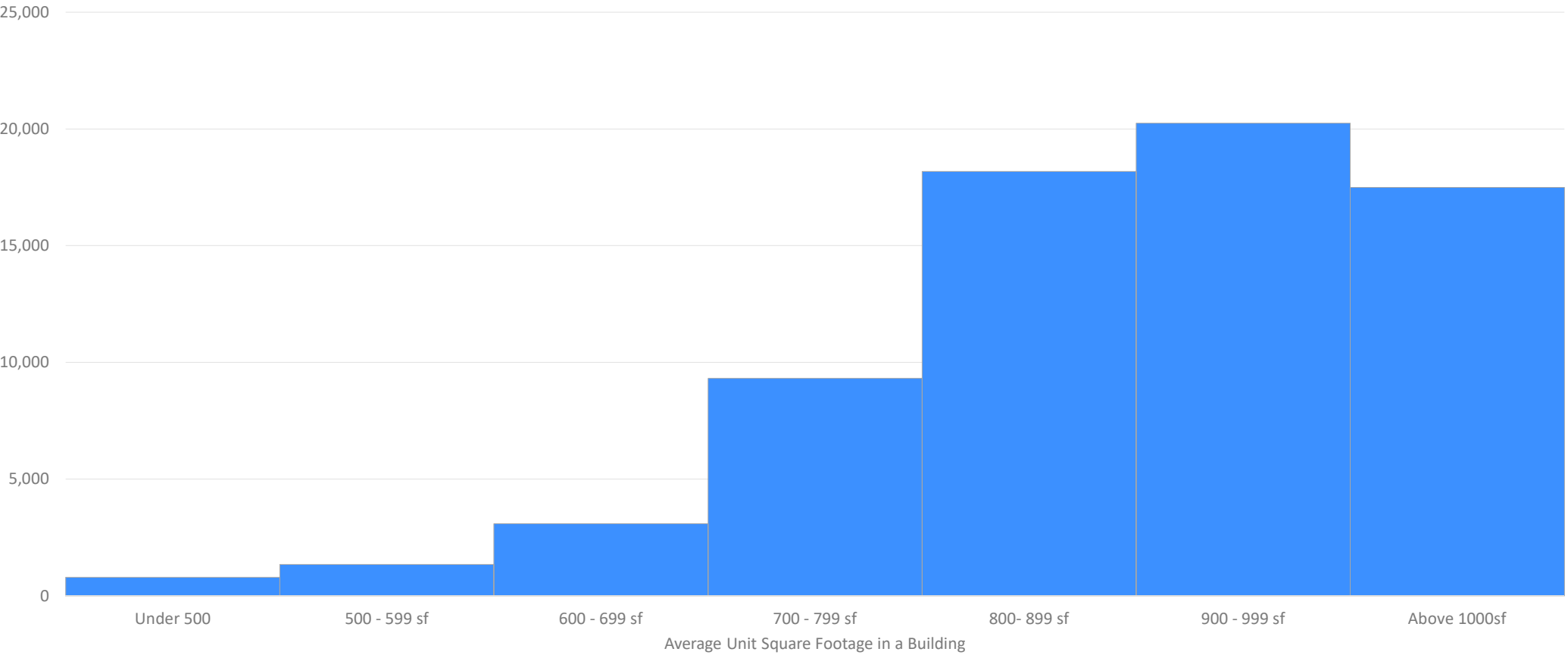
Multifamily dwelling units



Average Unit Square Footage

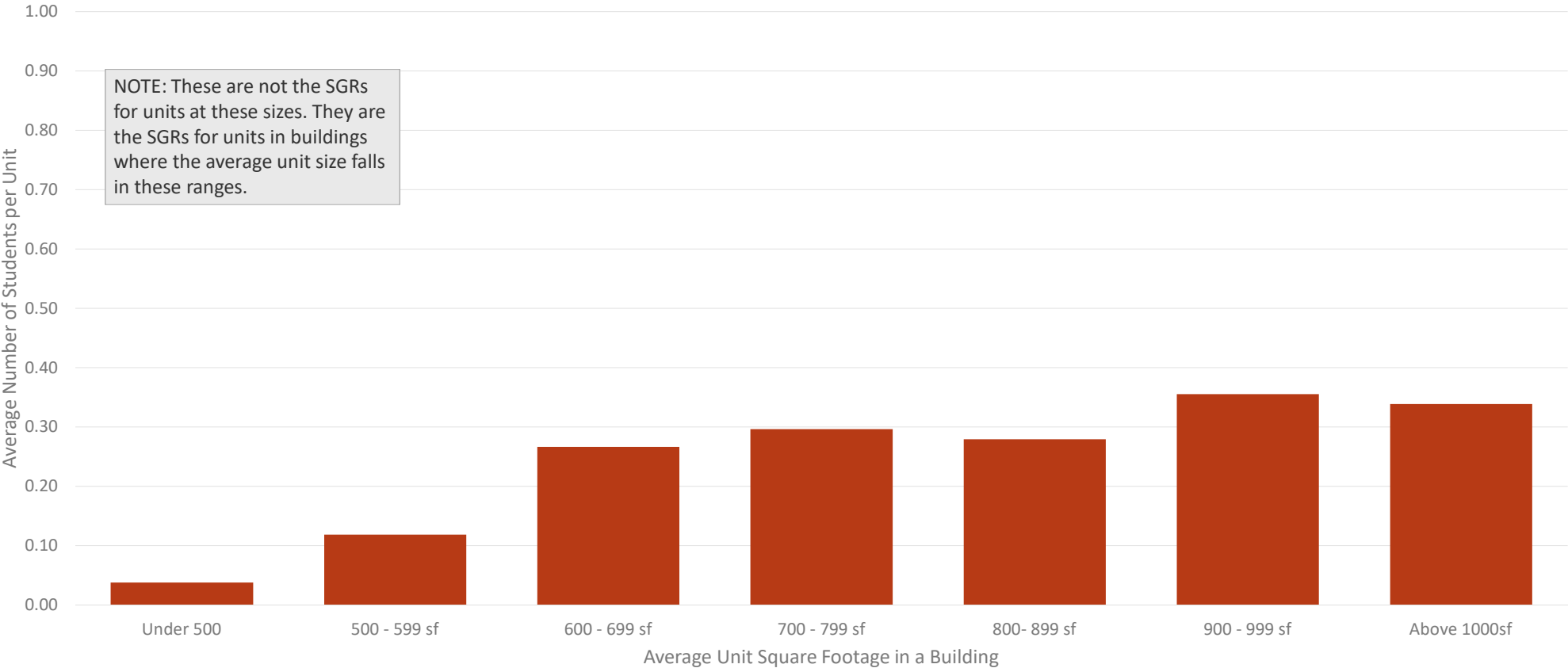
Multifamily dwelling units

Count of Multifamily Units



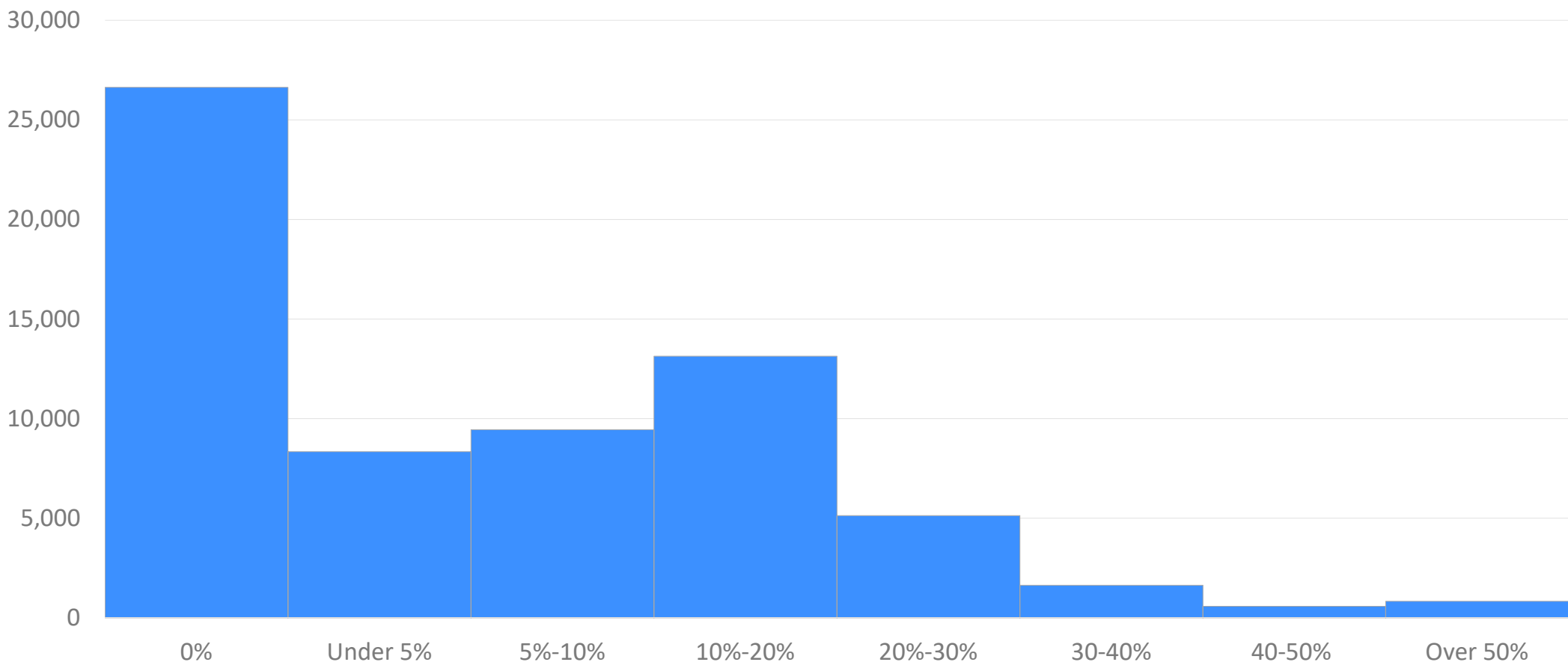
SGR by Average Unit Square Footage

Multifamily dwelling units



Units in Building by Share of 3-Bedroom Units

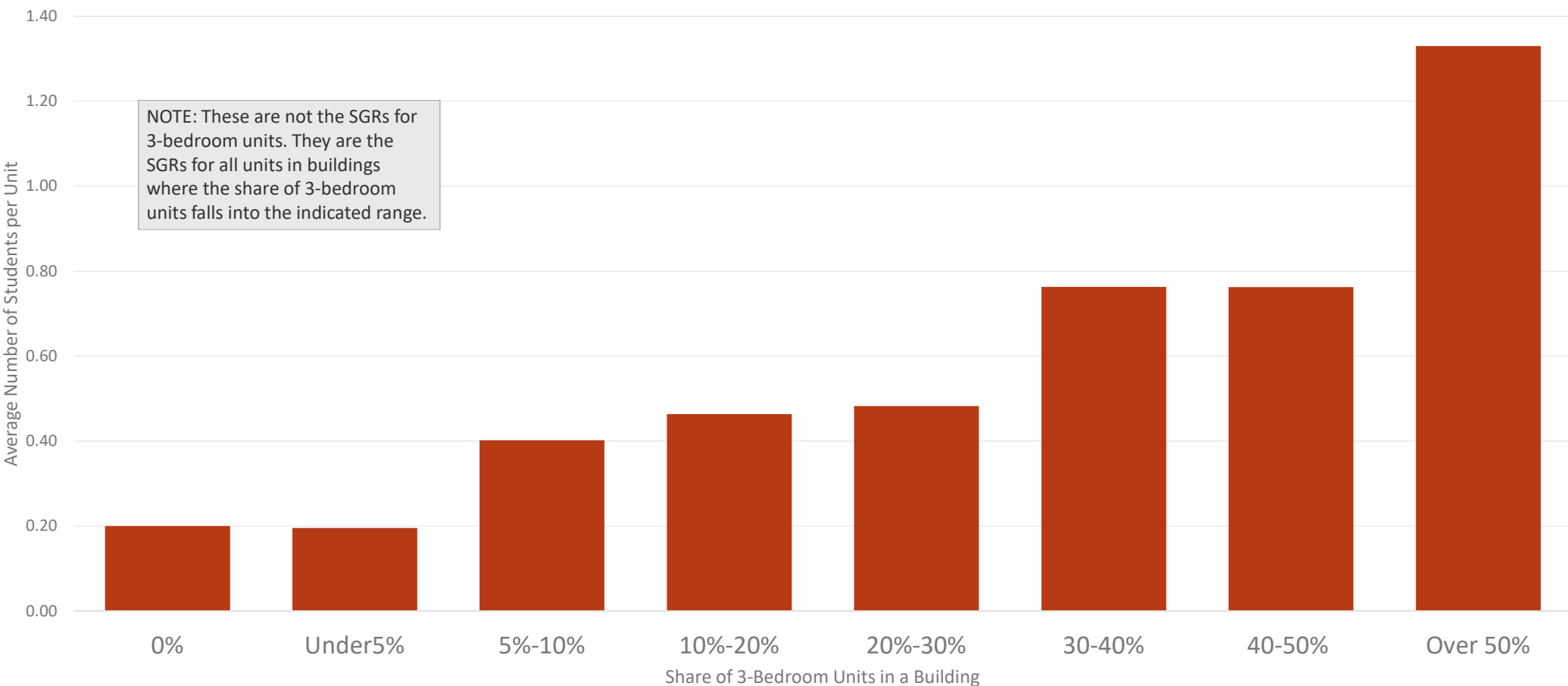
Multifamily dwelling units



Source: SDAT/DHCA

SGR by Share of 3-Bedroom Units

Multifamily dwelling units



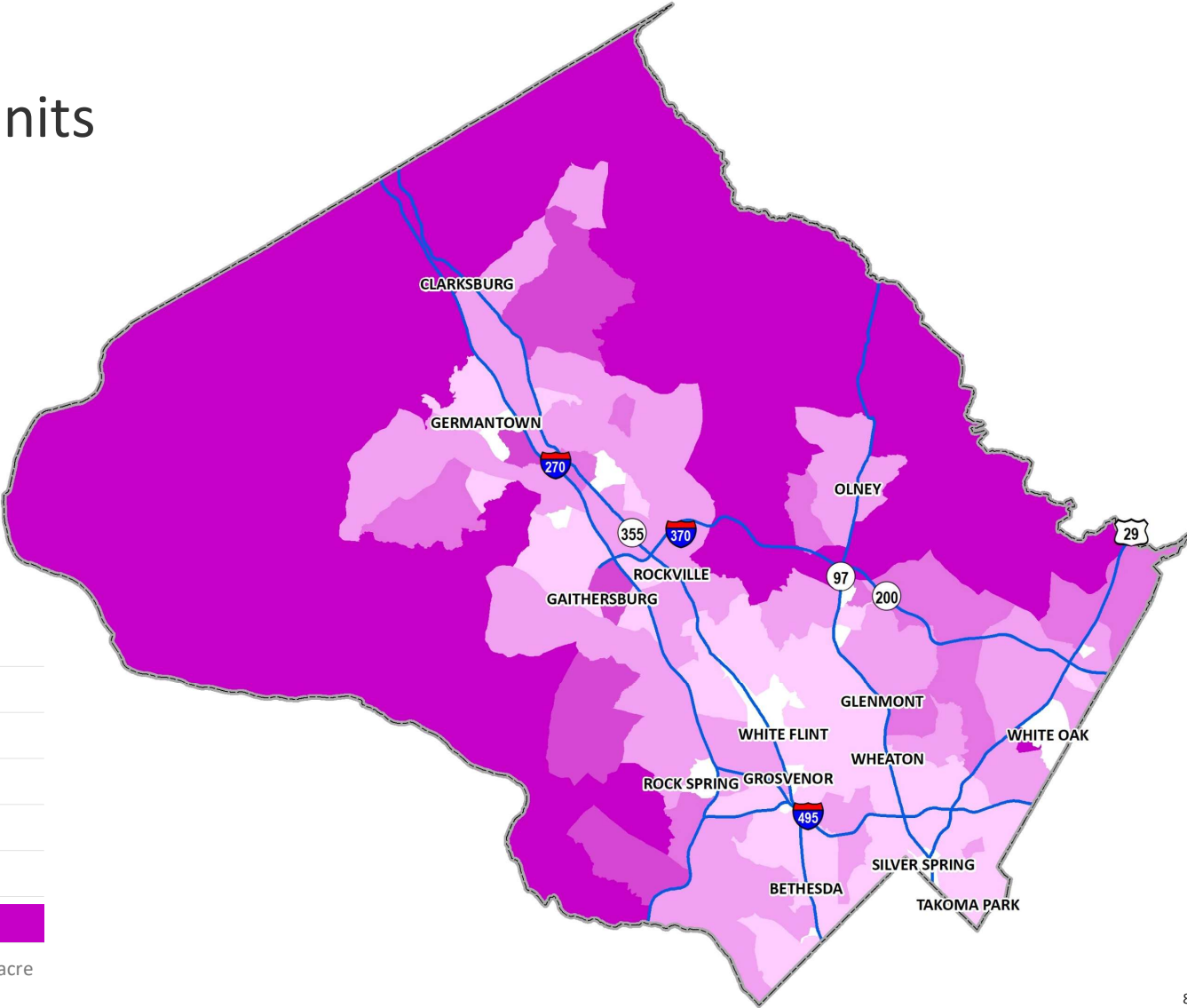
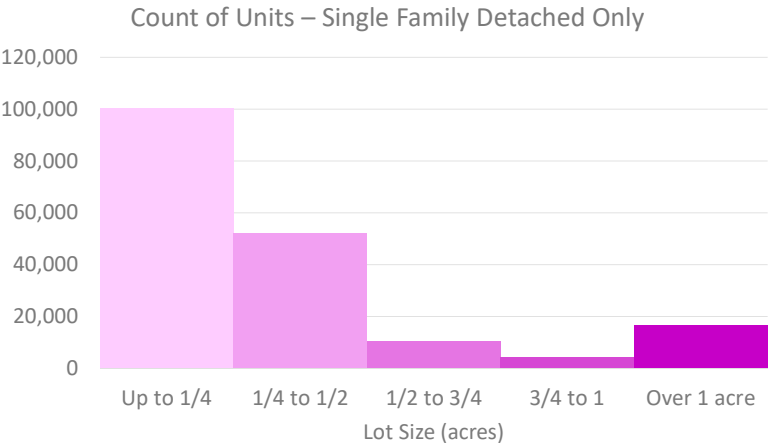
Source: SDAT/DHCA

Lot Size

Single family detached units

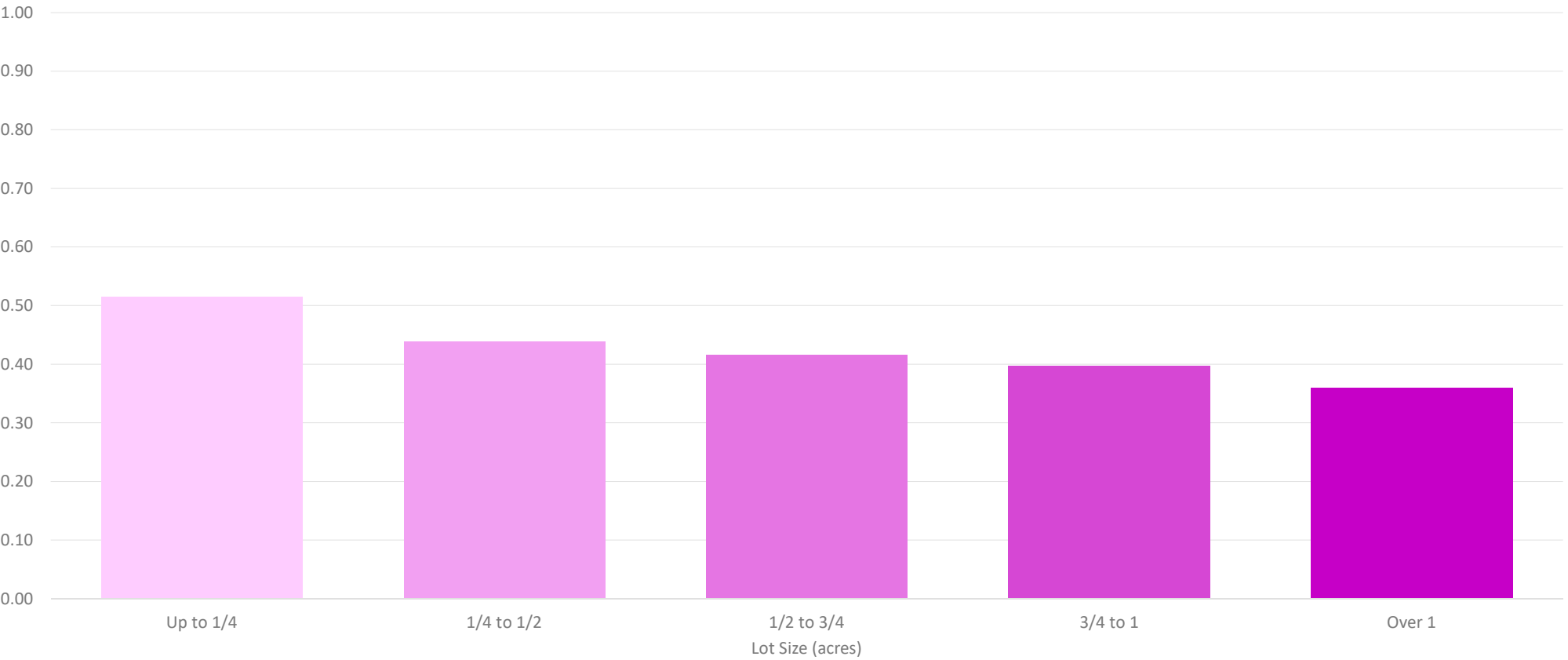
Average Lot Size by Census Tract

- 1/4-Acre and Under
- 1/4-Acre - 1/2-Acre
- 1/2-Acre - 3/4-Acre
- 3/4 Acre - 1-Acre
- Greater than 1-Acre



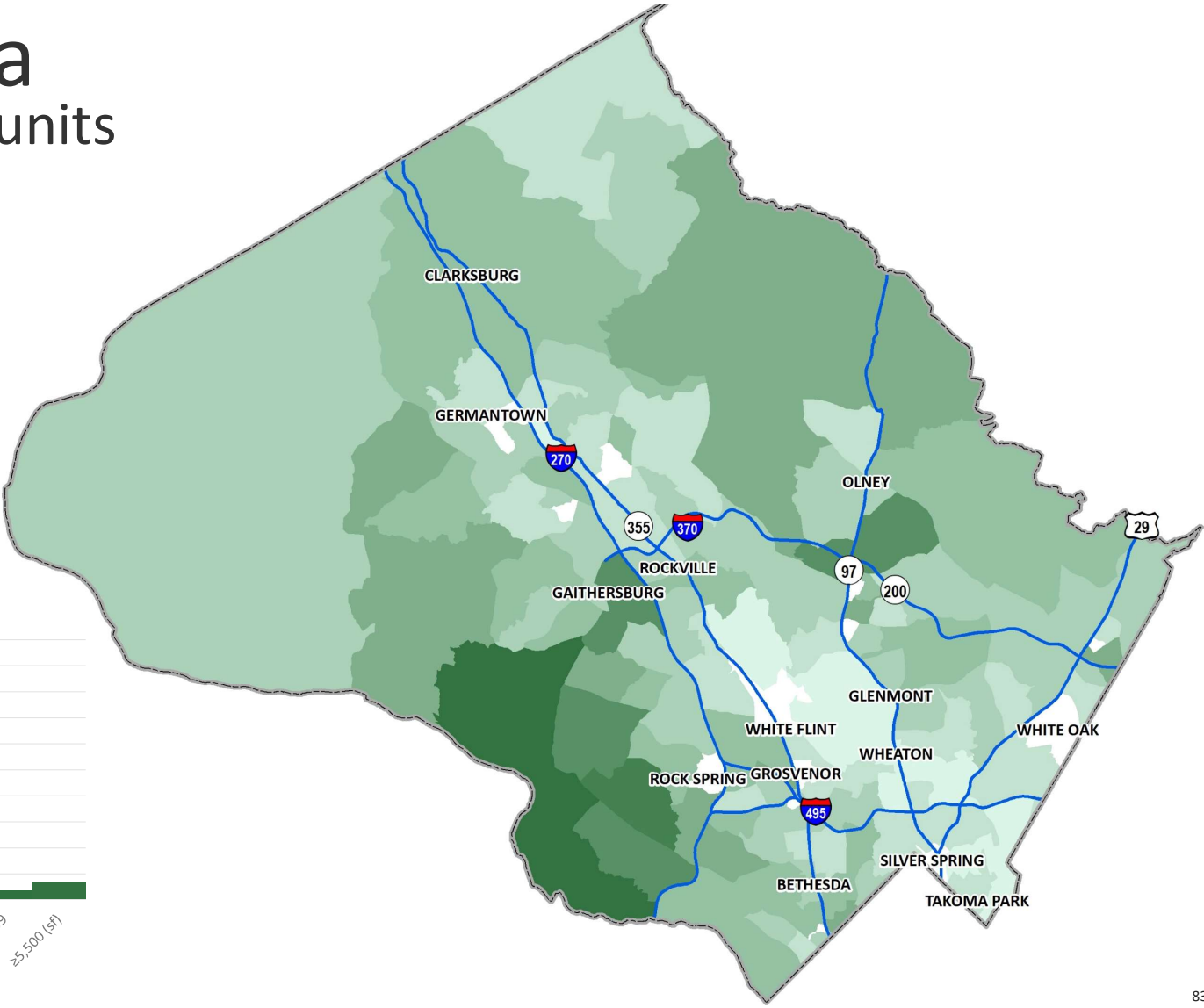
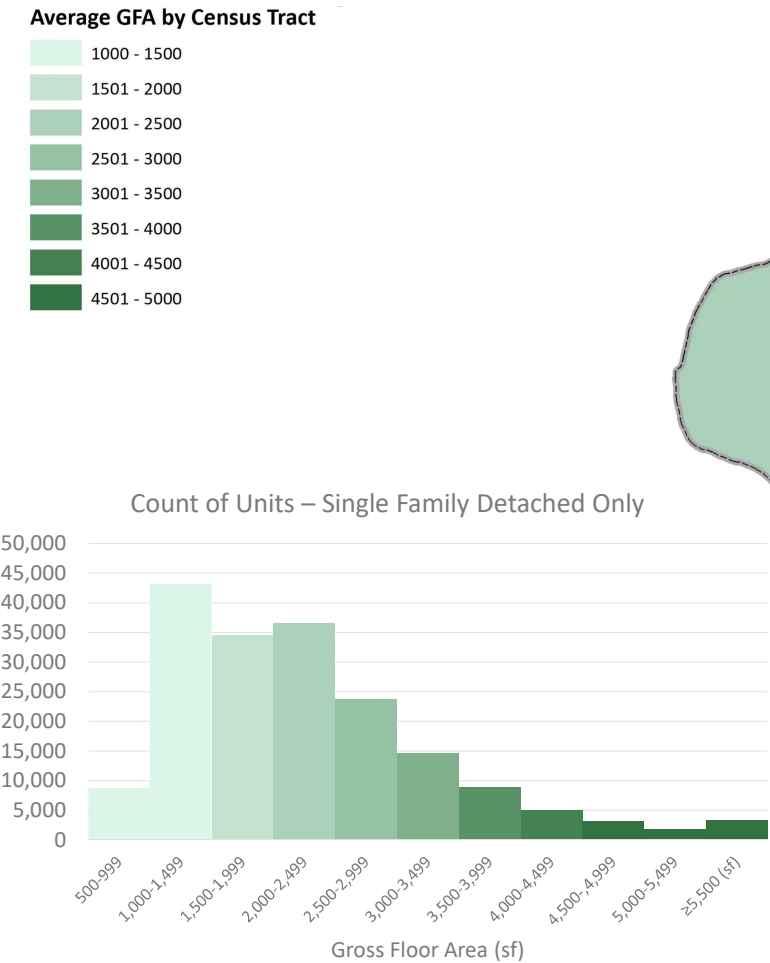
SGR by Lot Size

Single family detached units



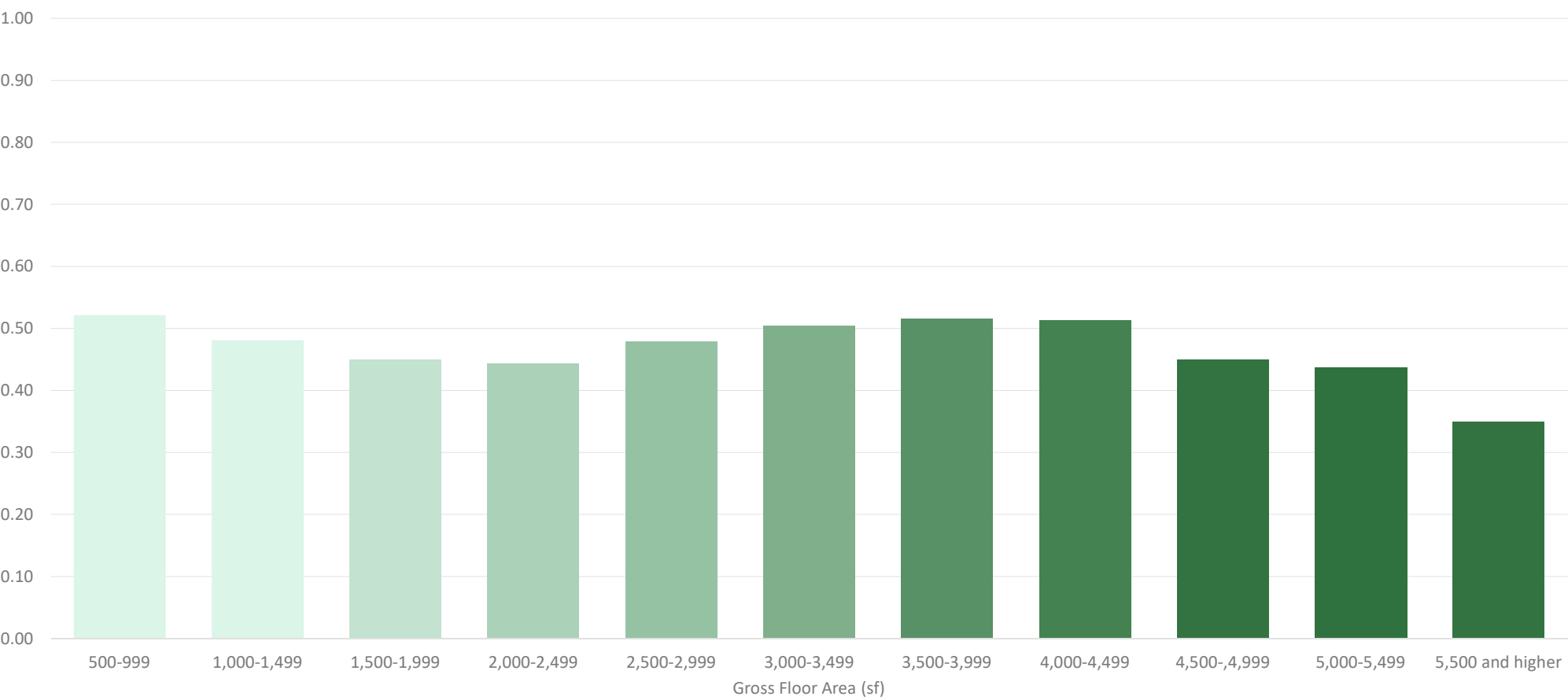
Gross Floor Area

Single family detached units

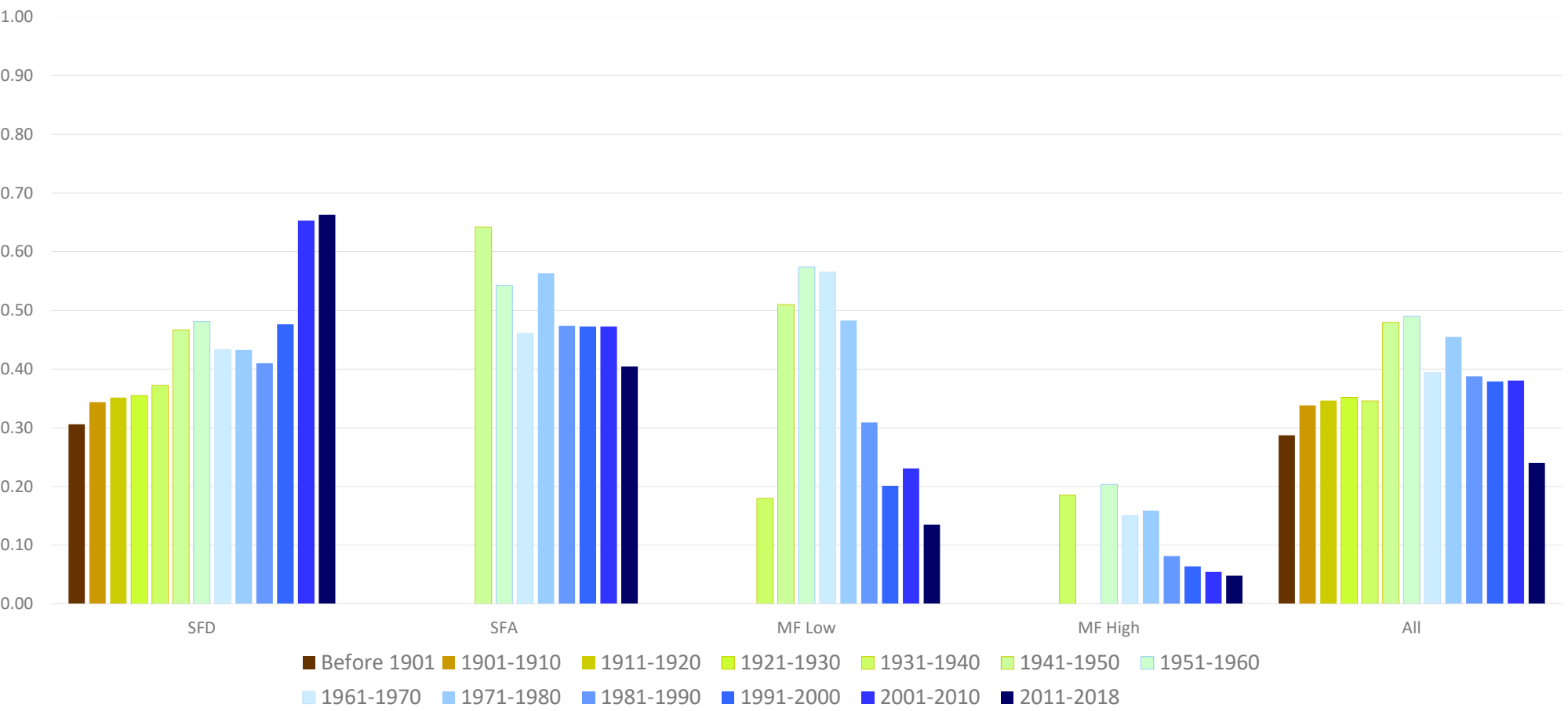


SGR by Gross Floor Area

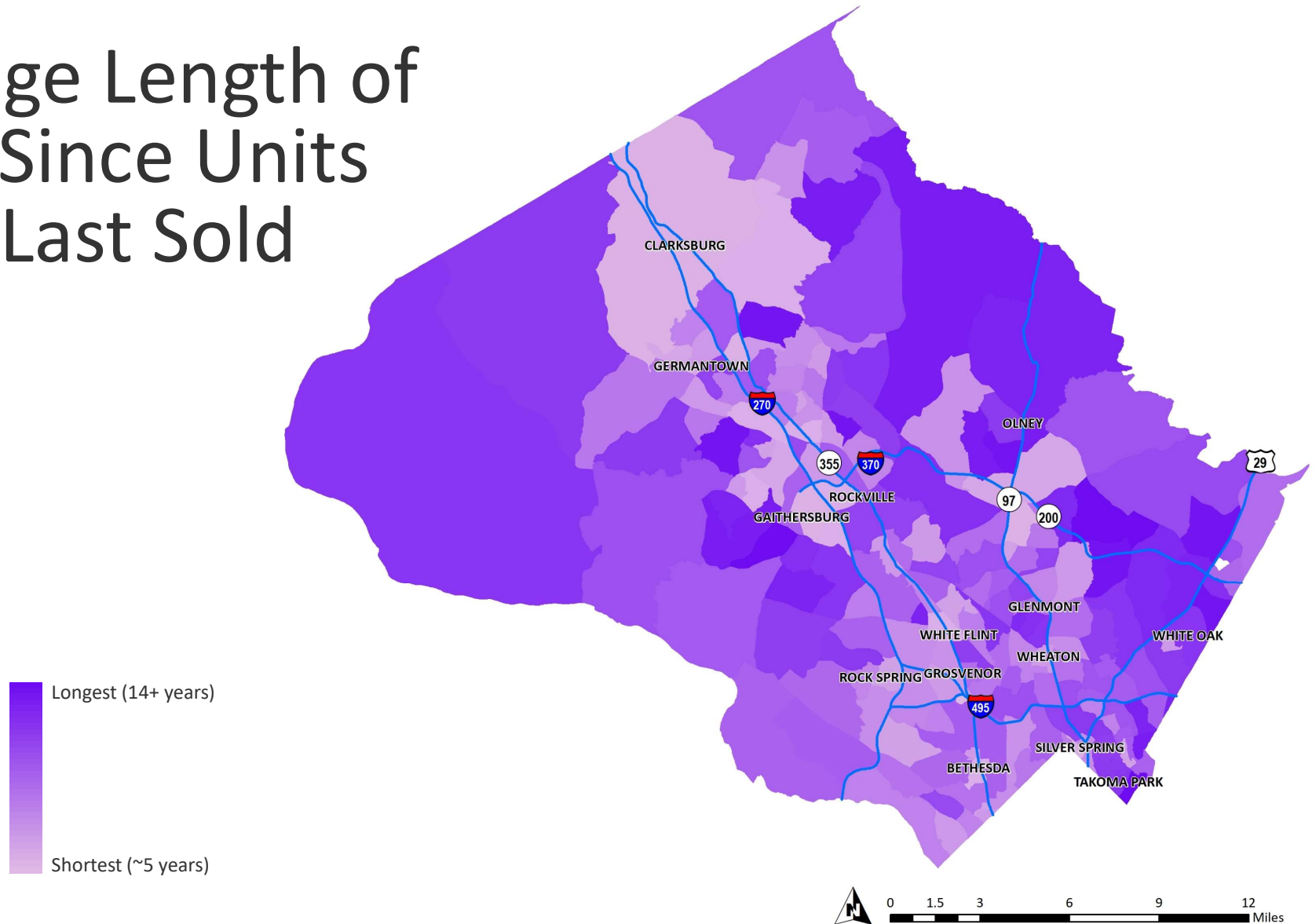
Single family detached units



SGR by Year Built and Dwelling Type

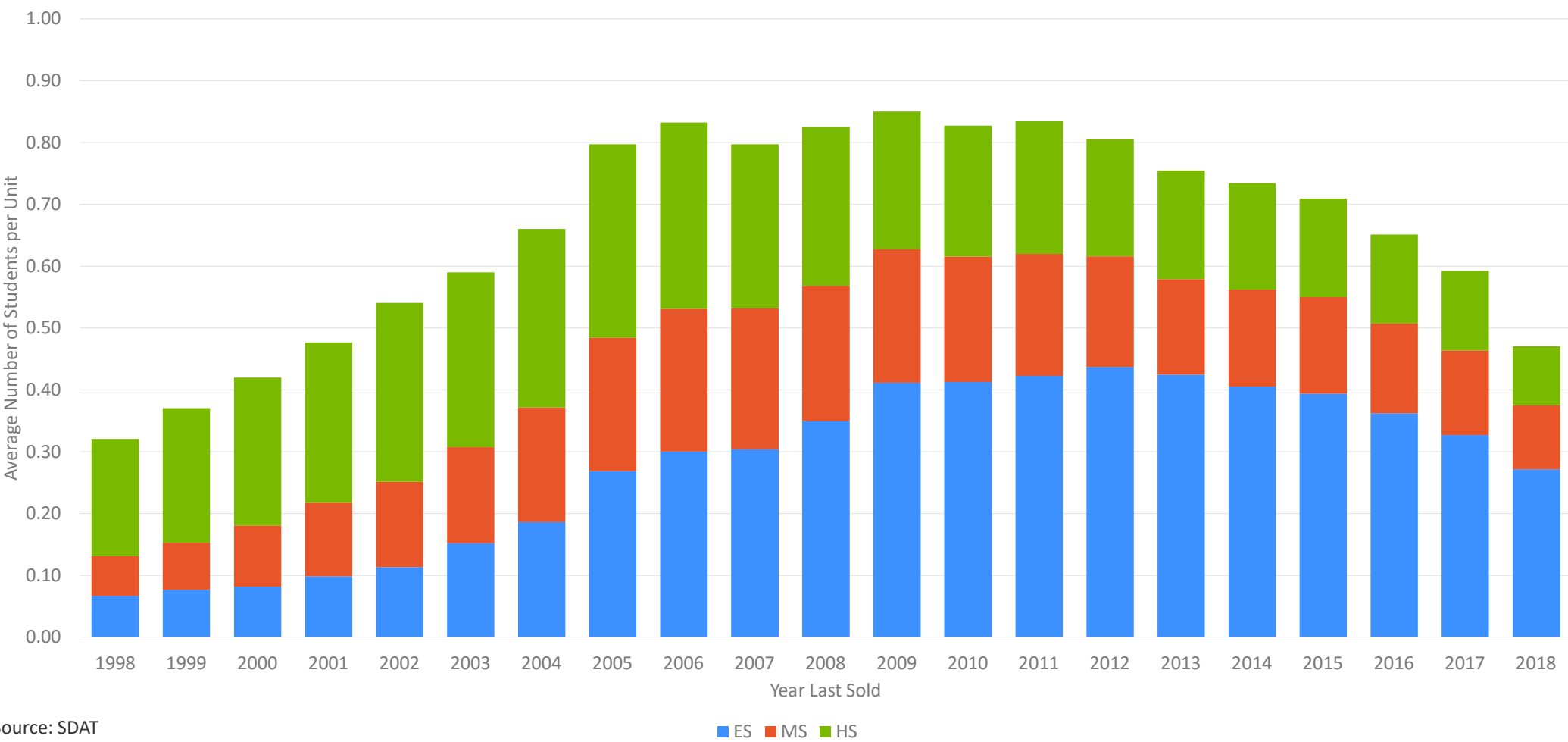


Average Length of Time Since Units were Last Sold



Source: SDAT

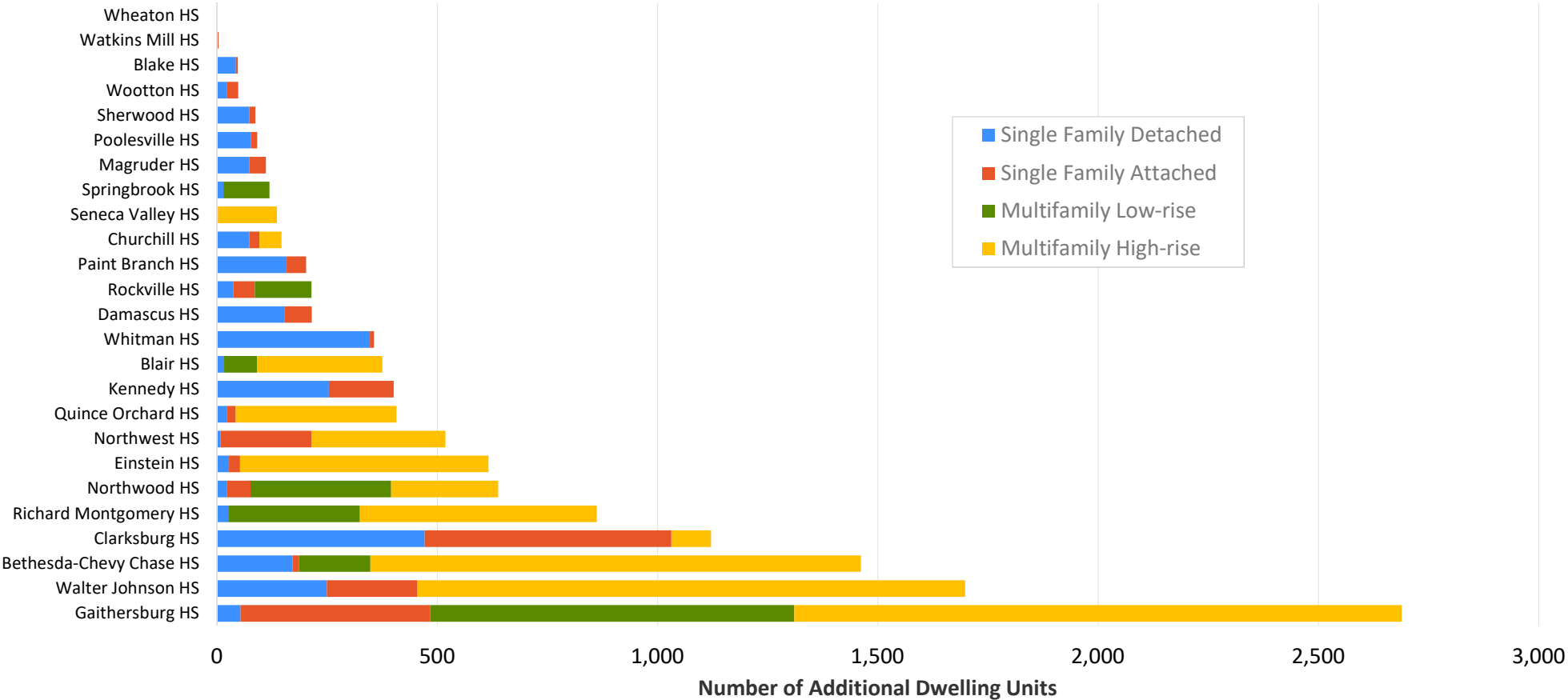
SGR by Year Last Sold (SFD only)



Source: SDAT

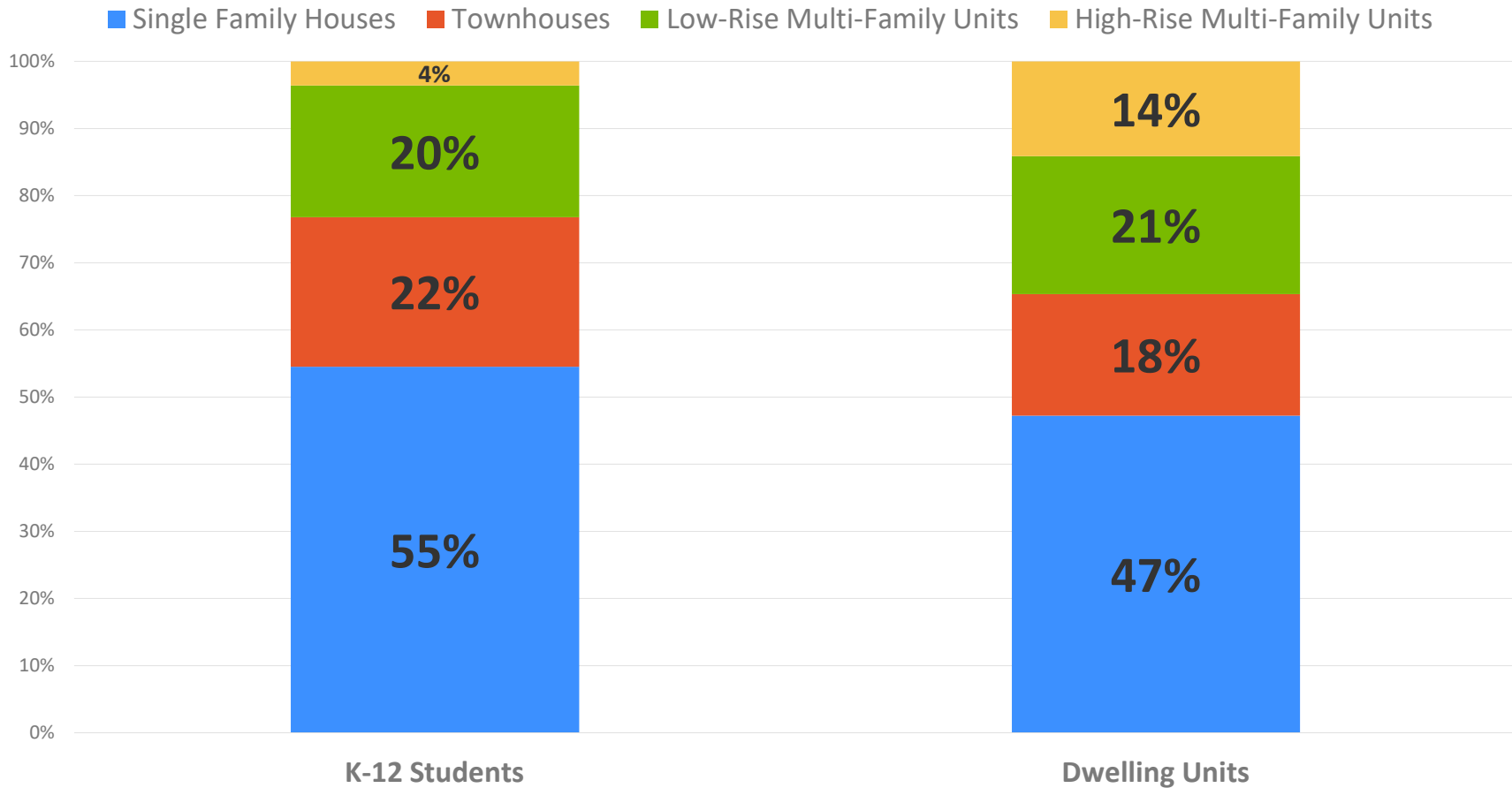
Sources of Enrollment Growth

Housing Growth by Cluster, 2015-18

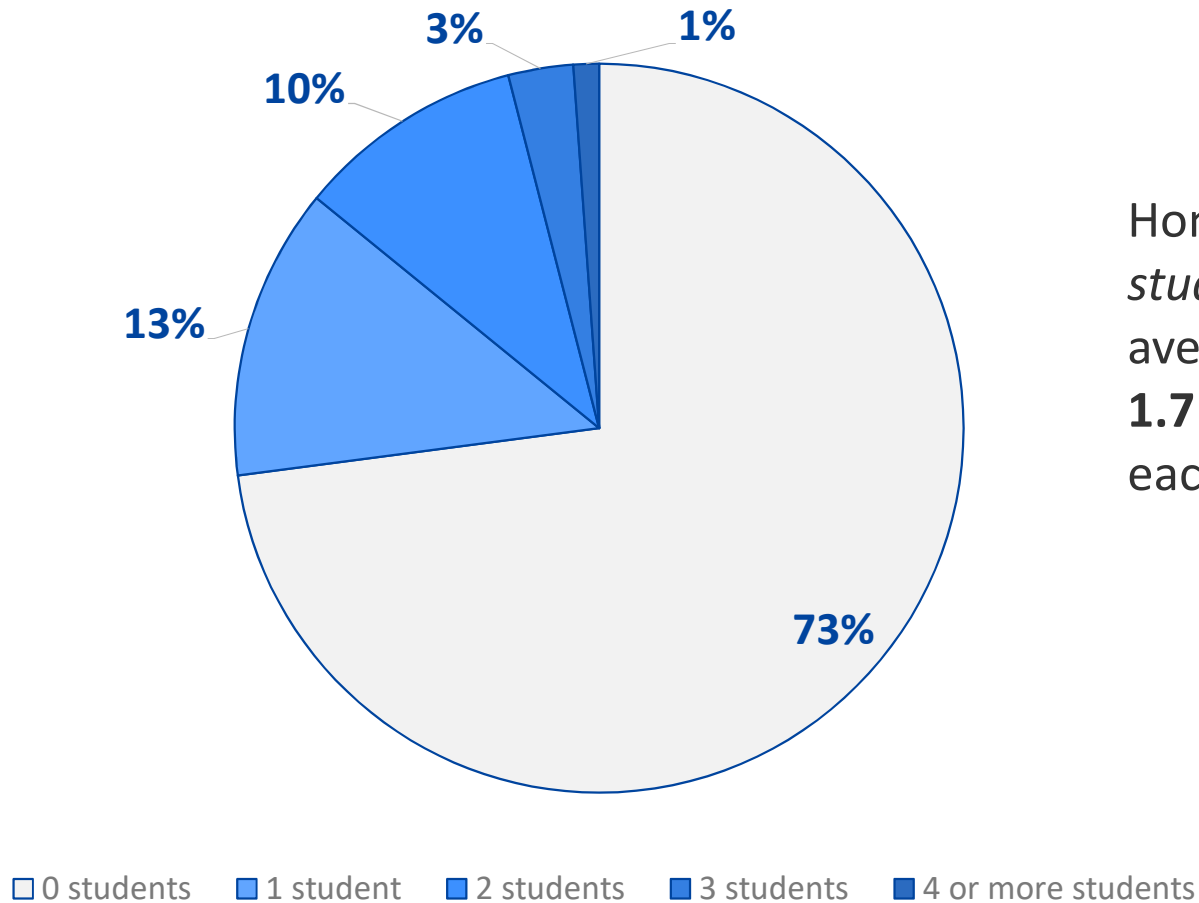


Source: SDAT

Share of Students and Units by Dwelling Type

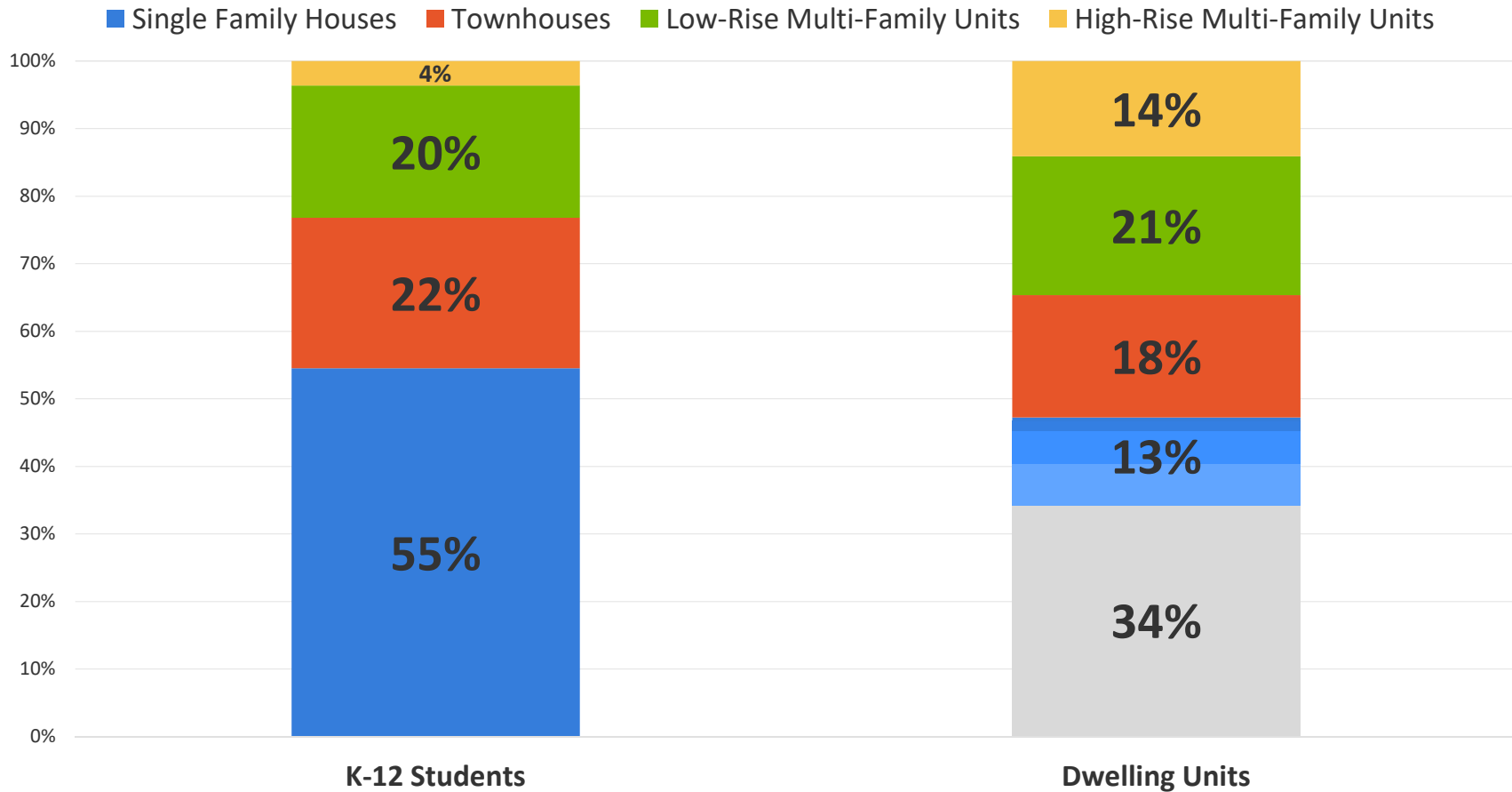


SFD Homes by Number of MCPS Students

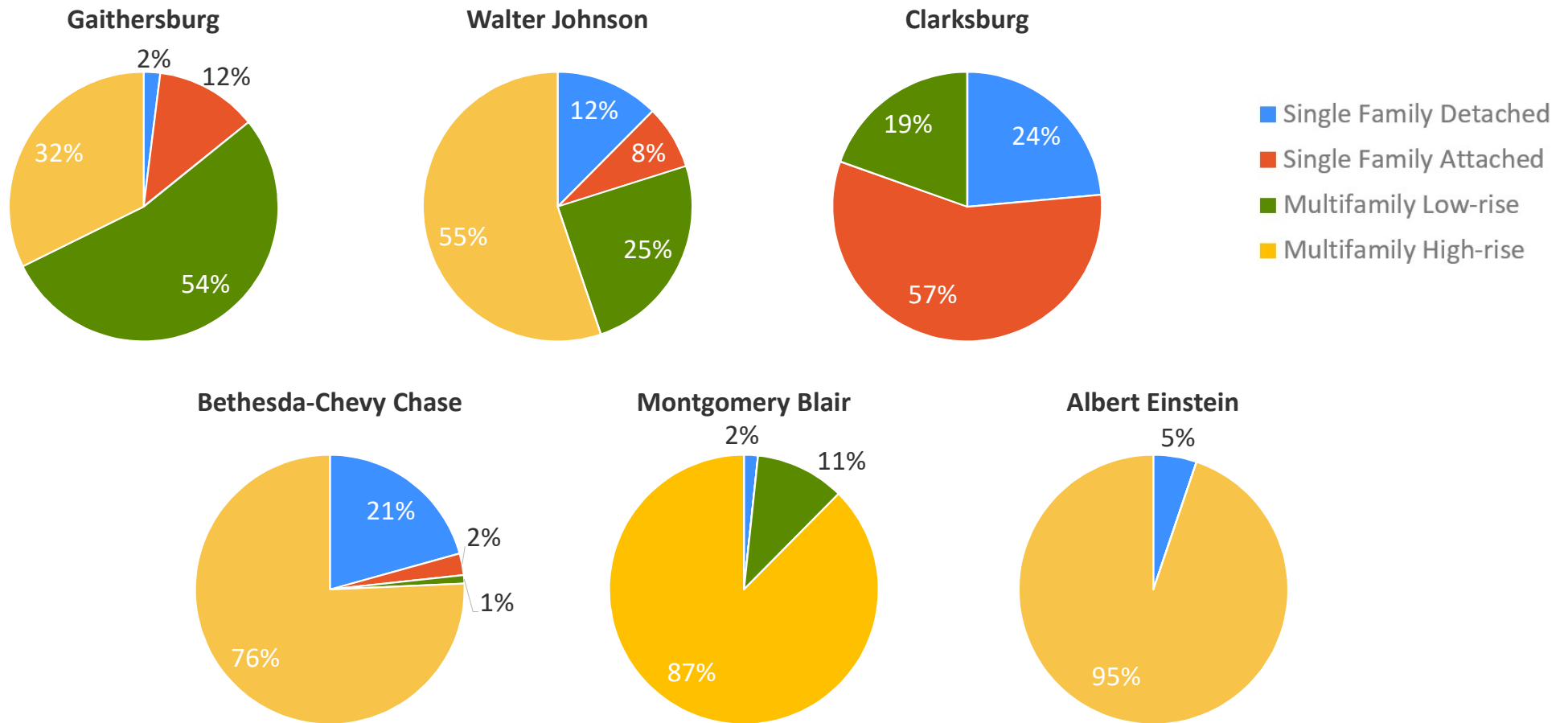


Homes *with students* on average have **1.7 MCPS students** each

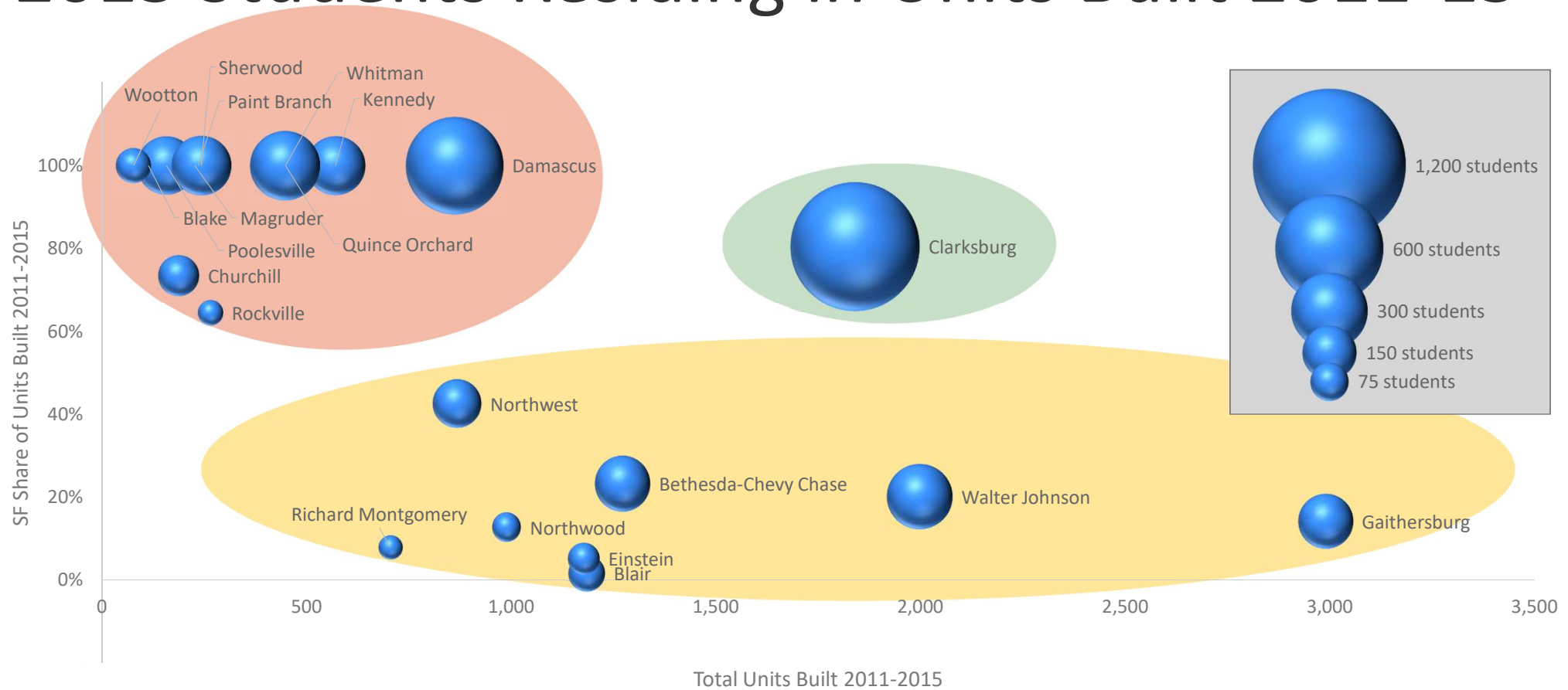
Share of Students and Units by Dwelling Type



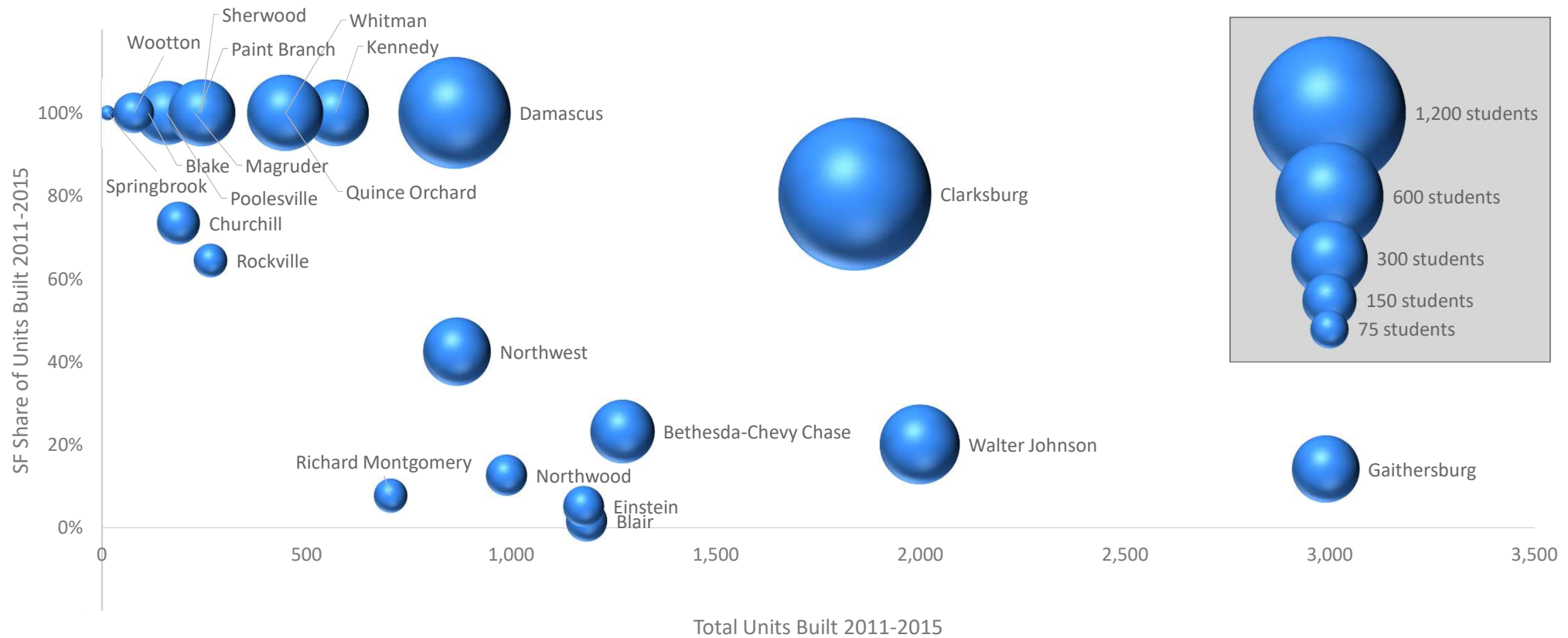
Unit Mix for Highest Housing Growth Clusters (2011-15)



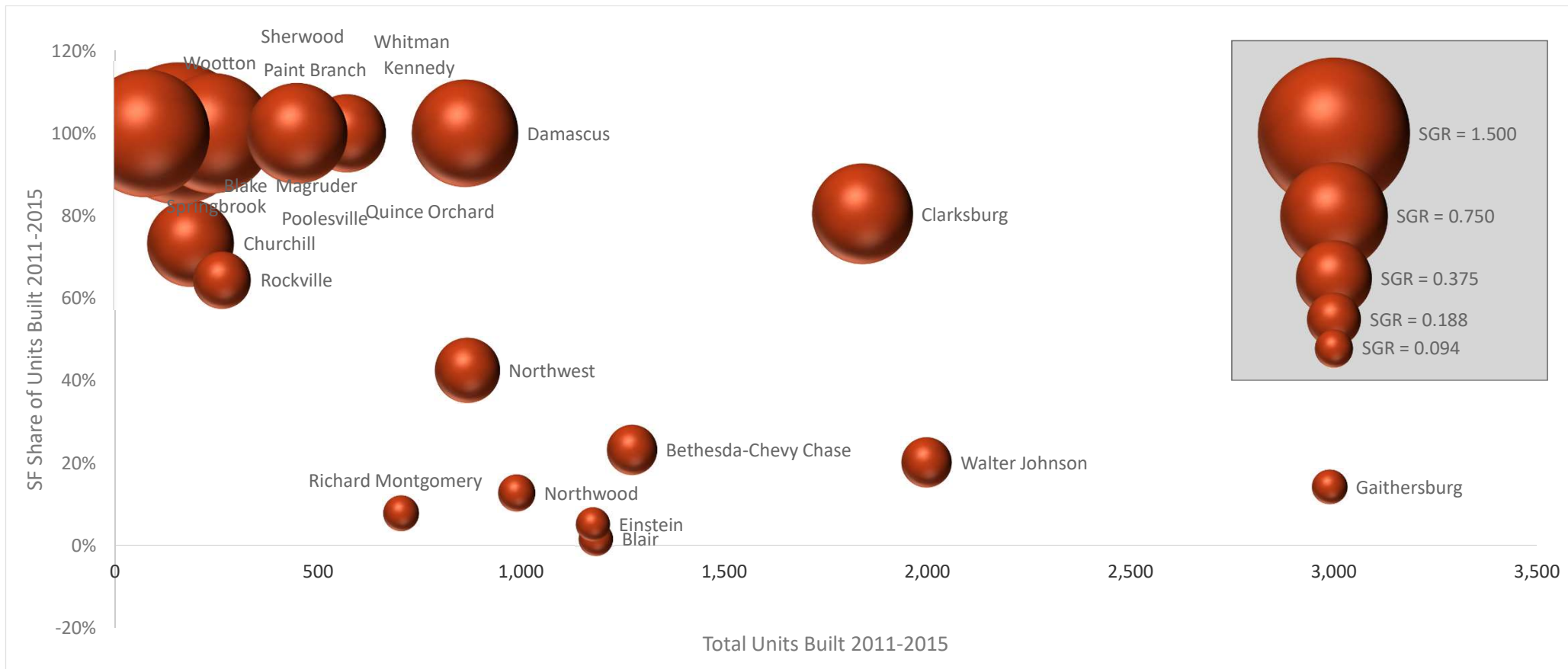
2015 Students Residing in Units Built 2011-15



2018 Students Residing in Units Built 2011-15



2018 SGRs for Units Built 2011-15



New Development vs. Neighborhood Turnover

- From 2010 to 2015, countywide enrollment grew by 12,383 students.
- The 17,100+ new dwelling units built between 2011 and 2015 included 3,423 students in 2015, or **27.6%** of the enrollment growth.
- From 2015 to 2018, countywide enrollment grew by an additional 6,233 students.
- The 17,100+ new dwelling units built between 2011 and 2015 included 1,322 more students in 2018, or **21.2%** of the additional enrollment growth.

New Development vs. Neighborhood Turnover

Unit Type	% of 2010 to 2015 Enrollment Growth Attributed to Units Built Between 2011 and 2015	2015 SGR for Units Built Between 2011 and 2015	2015 SGR for All Units	2015 SGR Comparison
Single Family Detached	15.2%	0.530	0.463	14%
Single Family Attached	8.2%	0.299	0.484	-38%
Multifamily Low-rise	2.6%	0.091	0.385	-76%
Multifamily High-rise	1.7%	0.031	0.139	-78%
ALL UNITS	27.6%	0.200	0.412	-51%

Unit Type	% of 2015 to 2018 Enrollment Growth Attributed to Units Built Between 2011 and 2015	2018 SGR for Units Built Between 2011 and 2015	2018 SGR for All Units	2018 SGR Comparison
Single Family Detached	8.5%	0.679 (+28%)	0.462	47%
Single Family Attached	7.0%	0.428 (+43%)	0.490	-13%
Multifamily Low-rise	2.4%	0.134 (+47%)	0.393	-66%
Multifamily High-rise	3.3%	0.062 (+100%)	0.110	-44%
ALL UNITS	21.2%	0.277 (+39%)	0.408	-32%

V. Viewpoints on Key Elements of the SSP

Annual School Test and Moratorium

- General agreement that the moratorium has not been effective at slowing enrollment growth.
- Moratorium + Development Pressure – serves as a tool to influence Board of Education capital investment
- Other consequences:
 - Hurts economic development and investment
 - Restricts housing supply, which therefore leads to an increase in home prices
 - Prevents the county from achieving its housing goals
 - Halts the construction of affordable housing units, which are primarily created through the MPDU program
 - Limits the collection of impact taxes, which help to fund the needed infrastructure

Adequacy Standards

- The idea of redefining the adequacy standards of the policy to include other facility conditions has been discussed
 - Some showed concerns over the potential complexity it may add
 - But general support for not only defining adequacy based on capacity
- Some options for execution that were discussed included:
 - Partnering with developers to handle facility maintenance projects,
 - Creating an equivalent of the transportation Unified Mobility Program for schools with facility needs
 - Using the MCPS Key Facilities Indicators metric as a measure of adequacy

Impact Taxes

- Discussed the appropriateness of setting impact taxes at 120% of the calculated impact.
- Questions around the justification for charging the supplemental impact tax for large homes (\$2.00 per square foot beyond 3,500 square feet up to 8,500 square feet)

School Facility Payments

- Discussions around potentially re-introducing School Facility Payments in a tiered way
- The more over-crowded a school or cluster, the more the developer would pay in facility fees (would be in conjunction with elimination of the moratorium)

One-Size-Fits-All

- General recognition that there is no single growth context for the county
- How this potentially comes into play:
 - Application of the moratorium
 - Application of impact taxes, school facility payments, etc.
 - Application of various exceptions to the above

VI. Next Steps

Next Steps

- March 26 – Growth trends briefing for the Planning Board
- May – Briefings on the Working Draft
- June 11 – Public hearing
- June and July – Planning Board work sessions
- July 30 – Planning Board approves its draft and transmits it to the Council